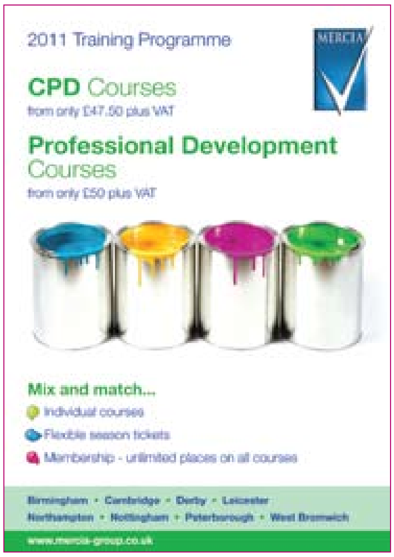
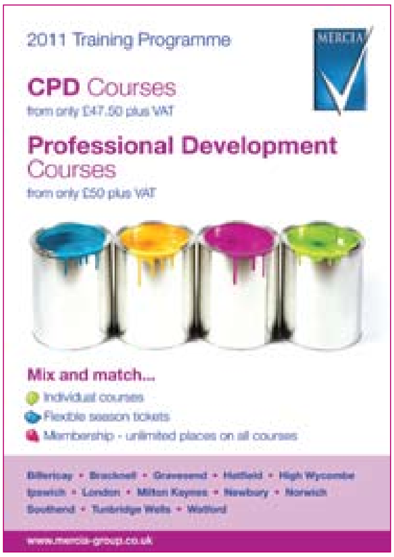
2011
Coursedirectory

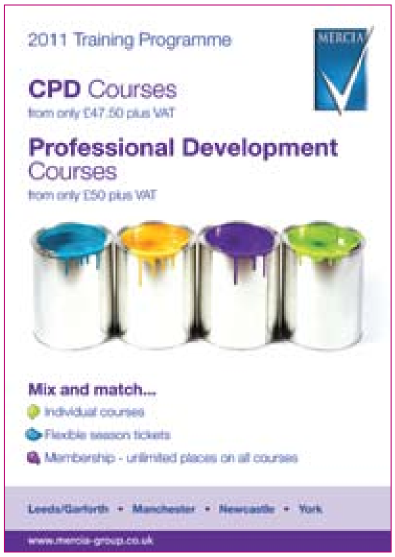
CPD, Professional Development and Personal, Management and Business Development Skills Courses for Today's Accountants

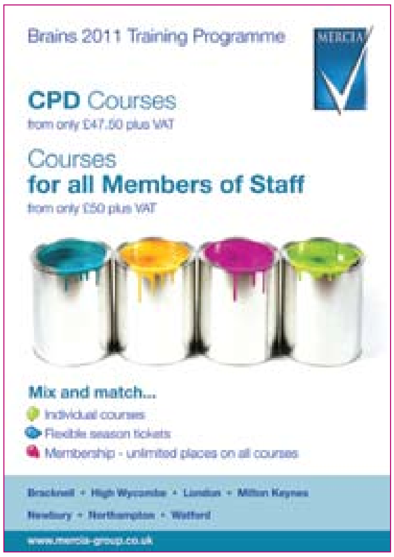
www.mercia-group.co.uk

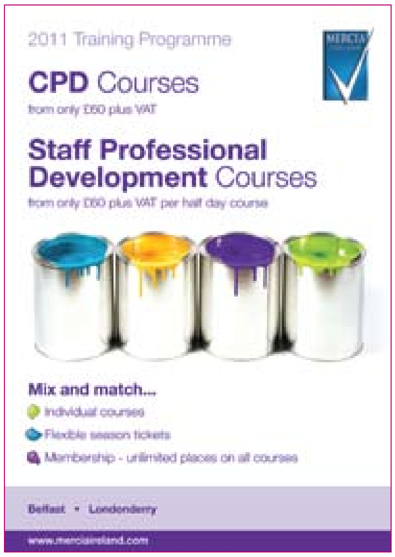
With over 50 venues nationwide you'll find our CPD courses on your doorstep!











Plus new for 2011

Colchester • Coventry • Darlington • Middlesbrough • Sheffield • Solihull • Walsall

To find our closest venue to you visit

www.mercia-group.co.uk/locations

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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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 online so you have ultimate flexibility when meeting your CPD requirements.

Individual courses

Our CPD, 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 £90, our Personal, Management and Business Development Skills courses from £185 and PD courses from £50.

Flexible season tickets

Our flexible season ticket costs just £475* for 10 CPD places with any number of additional places at just £47.50* 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 £47.50* throughout 2011. You can also mix and match venues. See pages 63 - 78 for details.

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

*£720/£60 in Northern Ireland.

Training group membership

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

MembershipPLUS

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

CPD membership

For those firms not wanting to send trainees and other junior staff on our courses CPD membership may be a viable alternative to membership. 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 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 members and multiple participants.

For further details see page 34 or alternatively visit www.mercia-group.co.uk/webinars

Professional Development courses online

Following the success of our online CPD courses, we are developing a series of Professional Development courses online.

These online course 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.

For details of courses and prices visit www.mercia-group.co.uk/digital

Online CPD courses

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 have access to 12 of our most popular online courses as part of their annual membership fee.

Individual online CPD courses

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

Sole practitioner	**£60**
2-4 partners	**£140**
5-9 partners	**£260**
10 or more partners	**£525**

The 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 be given access to a selection of 12 popular online CPD courses over a 12-month period. The cost of digital subscription is based on the size of your practice with a charge of £250 per firm plus £150 per partner, manager and senior 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

* All partners, managers and senior members of staff must be included in the subscription. These include those who are qualified either by examination or experience.

Look for the available online symbol for courses available online

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 2010 this was 'succession'.

The conferences planned for 2011 are:

Charities
London – 17 February 2011
Scotland – 8 March 2011
Midlands – 24 March 2011

Advising the Elderly
Midlands – 7 April 2011

Solicitors
Midlands – 17 May 2011

Healthcare
June 2011

Partners
June 2011

Farming
Midlands – 18 October 2011
Huntingdon – 4 November 2011

Tax Specialist
March 2011
May 2011

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 80 - 81.

Courses planned for 2011 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 online 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 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
Coventry	27 Jan	15:30-18:30	Debbie Taylor
	8 Jun	14:00-17:00	Debbie Taylor
High Wycombe	16 May	14:00-17:15	Debbie Taylor
London	14 Jun	14:00-17:00	Debbie Taylor
Oxford	25 May	15:30-18:30	Debbie Taylor

£120 plus VAT
per person

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
Middlesbrough	1 Mar	09:30-12:30	Bob Truncheon

£90 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
Bury St Edmunds	8 Feb	15:00-18:00	Nigel Smith
Exeter	31 Mar	14:00-17:00	Nigel Smith

£90 plus VAT per person

Season Ticket Option Available

Preparing and Implementing a Business Sale and Exit

OBJECTIVES

The 21st Century has already seen major changes in the way people view their business and the working environment. Many business owners cannot rely only on their past savings and pension funds to fund their retirement. Many owners are now much more aware of the possibility of grooming their business in order to maximise its capital value and sell profitably to enjoy a comfortable retirement.

This course is designed to help delegates understand the processes involved in preparing a business for exit from examining the personal goals of the owner through to preparing an Information Memorandum on the business.

CONTENT

The course will cover:

- How "Capital Value" is generated
- Personal goal setting
- Performing a business diagnostic
- Marketing the service to business owners
- Timing and the steps in grooming a business for sale
- An overview of valuation techniques
- Information Memorandums
- Marketing the business to potential buyers
- Surviving due diligence work and
- Getting paid!

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	1 Mar	13:45-16:45	John Welsford
Colchester	10 May	15:30-18:30	John Welsford
Solihull	29 Mar	15:30-18:30	Jim Thomas

£90 plus VAT per person

Season Ticket Option Available

Accountancy Update & Current Issues

available online

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	27 Sep	13:30-16:30	John Welsford
Belfast *	29 Mar	13:45-16:45	Phil Frost
Billericay	21 Mar	14:00-17:15	John Selwood
Birmingham	31 Mar	09:15-12:15	Andrew Güntert
	31 Mar	14:30-17:30	Andrew Güntert
Bracknell	21 Nov	14:00-17:15	John Selwood
Bristol	12 May	09:30-12:30	Phil Frost
	12 May	13:45-16:45	Phil Frost
Bury St Edmunds	25 May	15:00-18:00	John Welsford
Cambridge	30 Mar	15:00-18:00	Andrew Güntert
Colchester	8 Mar	15:30-18:30	Andrew Güntert
Darlington	19 Apr	14:00-17:00	Phil Frost
Derby	5 Apr	14:30-17:30	Andrew Güntert
Edinburgh	26 Sep	13:30-16:30	John Welsford
Exeter	3 May	14:00-17:00	Phil Frost
Glasgow	28 Sep	13:30-16:30	John Welsford
Gravesend	16 Mar	14:00-17:15	John Selwood
Hatfield	19 Apr	14:00-17:15	Andrew Güntert
High Wycombe	23 Mar	14:00-17:15	John Selwood
	8 Nov	14:00-17:15	Andrew Güntert
Ipswich	23 Mar	09:30-12:45	Andrew Güntert
	23 Mar	14:00-17:15	Andrew Güntert
Lancaster	22 Mar	14:00-17:00	John Welsford
Leeds	9 Mar	14:00-17:15	John Selwood
Leicester	29 Mar	09:15-12:15	Andrew Güntert
	14 Apr	09:15-12:15	Andrew Güntert
	14 Apr	14:00-17:00	Andrew Güntert
London	7 Mar	14:00-17:15	John Selwood
Londonderry *	28 Mar	13:45-16:45	Phil Frost
Manchester	10 Mar	14:00-17:15	John Selwood
Middlesbrough	7 Apr	09:30-12:30	Phil Frost
Milton Keynes	15 Mar	14:00-17:15	John Selwood
Newbury	15 Nov	14:00-17:15	Andrew Güntert
Newcastle	17 Mar	15:30-18:30	Andrew Güntert
Northampton	29 Mar	14:30-17:30	Andrew Güntert
	11 Apr	14:30-17:30	Andrew Güntert
Norwich	22 Mar	13:30-16:45	John Selwood
Nottingham	5 Apr	09:15-12:15	Andrew Güntert
	20 Apr	14:00-17:00	Andrew Güntert
Oxford	5 Apr	15:30-18:30	John Welsford
	9 May	15:30-18:30	John Welsford
Peterborough	18 Apr	15:00-18:00	Andrew Güntert
Southend	14 Mar	14:00-17:15	John Selwood
Stirling	29 Sep	13:30-16:30	John Welsford
Tunbridge Wells	28 Mar	14:00-17:15	John Selwood
Walsall	11 Apr	14:00-17:00	Phil Frost
	18 Apr	14:00-17:00	Phil Frost
Watford	15 Mar	14:00-17:15	Andrew Güntert
West Bromwich	13 Apr	09:15-12:15	Andrew Güntert
	13 Apr	14:30-17:30	Andrew Güntert
York	16 Mar	14:00-17:15	Andrew Güntert

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Acting for Doctors

OBJECTIVES

In this rapidly changing and increasingly competitive niche market, it is essential that accountants are aware of the most recent technical developments. Now that the 2004 contract has been in place for a number of years, the practical implications have become clearer. Unfortunately, just as we started to understand the contract the coalition has started the most radical reconstruction of the healthcare sector since 1947. The course is aimed at helping accountants to assist their clients in responding to the changes on both strategic and detailed levels.

CONTENT

- The GP and the NHS. The changing relationship starting with the GP contract and other developments affecting general practice including practical issues arising on:
  - Goodwill and negative equity
  - Superannuation and pensions
  - Partnership deeds – the main specialist financial clauses
  - VAT implications
  - Benchmarking
  - Where are we with incorporation?
  - Maximising income (such as developing other income streams)
  - Marketing tips
- Stop press - the most recent developments on the new structure

CPD HOURS: 3

Venue	Date	Time	Speaker
Leicester	9 Feb	14:00-17:00	Bob Trunchion
London	22 Feb	14:00-17:00	Bob Trunchion

£120 plus VAT per person

Acting for FSA Clients: An Introduction

OBJECTIVES

Most mortgage, general insurance, stock broking and IFA type entities 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, fieldwork and completion stages

Case studies will form part of the course.

CPD HOURS: 6 (Audit related: 6)

Venue	Date	Time	Speaker
London	24 Nov	09:30-17:00	Ian Fletcher
Nottingham	23 Mar	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 and ACCA pronouncements in this specialist area.

CONTENT

This course will cover:

- FSA rule changes
- APB, ICAEW and 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
Bristol	25 Oct	13:45-16:45	Ian Fletcher
Coventry	7 Sep	14:00-17:00	Ian Fletcher
London	17 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 requirements 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	31 Mar	14:00-17:00	Ian Fletcher
Nottingham	2 Nov	14:00-17:00	Ian Fletcher

£130 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	4 Apr	14:00-17:15	Phil Frost
	7 Sep	14:00-17:15	Jane Everingham
Sheffield	7 Jun	16:00-19:00	Phil Frost
	15 Jun	09:30-12:30	Phil Frost
	20 Jun	14:00-17:00	Phil Frost

£90 plus VAT per person

Season Ticket Option Available

Audit Update

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
- Be aware of common problem areas in the audit of owner managed businesses and how to avoid them.

CONTENT

- Clarified ISAs: An overview of the changes and practical guidance on how to implement the standards effectively
- Latest guidance on owner managed business audits, including PN26 (revised) and its future
- ES3 (revised) Long Association with the Audit Engagement
- Audit reports: A reminder of all of the changes to the wording of reports and to signing procedures
- Going concern: Guidance from the APB and the impact on the audit report
- POB report and QAD/ACCA feedback from visits

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Aberdeen	7 Dec	13:30-16:30	David Gallagher
Belfast *	29 Mar	09:30-12:30	Phil Frost
Billericay	13 Apr	14:00-17:15	John Welsford
Birmingham	23 Feb	09:15-12:15	Jeremy Williams
	23 Feb	14:30-17:30	Jeremy Williams
Bracknell	6 Apr	09:30-12:45	Jeremy Williams
Bristol	10 Oct	13:45-16:45	David Gallagher
Bury St Edmunds	13 Oct	15:00-18:00	David Gallagher
Cambridge	7 Mar	15:00-18:00	Jeremy Williams
Derby	1 Mar	14:30-17:30	David Gallagher
Exeter	11 Oct	14:00-17:00	David Gallagher
Glasgow	8 Dec	13:30-16:30	David Gallagher
Gravesend	7 Apr	14:00-17:15	Jeremy Williams
High Wycombe	13 Apr	14:00-17:15	Jeremy Williams
Ipswich	20 Apr	14:00-17:15	Jeremy Williams
Lancaster	16 Nov	14:00-17:00	Andrew Güntert
Leicester	24 Feb	14:00-17:00	David Gallagher
	15 Mar	14:00-17:00	David Gallagher
London	14 Apr	14:00-17:15	John Welsford
Londonderry *	28 Mar	09:30-12:30	Phil Frost
Manchester	19 Apr	14:00-17:15	John Welsford
Milton Keynes	5 Apr	14:00-17:15	Jeremy Williams
Newbury	4 Apr	14:00-17:15	Jeremy Williams
Newcastle	11 Apr	15:30-18:30	Jeremy Williams
Northampton	10 Feb	09:15-12:15	David Gallagher
	2 Mar	14:30-17:30	Jeremy Williams
Norwich	11 Apr	13:30-16:45	John Welsford
Nottingham	22 Feb	09:15-12:15	Jeremy Williams
	9 Mar	14:00-17:00	Jeremy Williams
Oxford	3 Mar	15:30-18:30	David Gallagher
	14 Mar	15:30-18:30	David Gallagher
Peterborough	21 Feb	15:00-18:00	David Gallagher
Tunbridge Wells	18 Apr	14:00-17:15	Jeremy Williams
Watford	7 Apr	14:00-17:15	John Welsford
West Bromwich	17 Mar	09:15-12:15	David Gallagher
	17 Mar	14:30-17:30	David Gallagher
York	12 Apr	14:00-17:15	Jeremy Williams

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Audit and Accounts of Group Companies

OBJECTIVES

The main focus of this course is to provide a refresher and guidance on the recurring practical issues involved in the preparation and audit of group accounts. This area has increased in significance since the Companies Act 2006 extended the requirement to medium sized group. Clarified ISAs bring about further changes.

CONTENT

- Determining investment status
- Exemptions and exclusions from consolidations
- Issues arising from the preparation of consolidated accounts including:
  - Goodwill
  - Acquisitions and disposals
  - Cash flow statements
  - Associates and joint ventures
- Auditing issues including:
  - Requirements of clarified ISAs

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Belfast	1 Nov	13:45-16:45	Phil Frost
Coventry	18 Mar	09:30-12:30	Phil Frost
Edinburgh	7 Mar	13:30-16:30	Phil Frost
High Wycombe	3 Mar	14:00-17:15	Phil Frost
Sheffield	6 Apr	14:00-17:00	Phil Frost

* Alternative prices apply at these venues

£120 plus VAT per person

Auditing in a Recessionary Environment

OBJECTIVES

The continuing adverse economic environment has added a number of additional burdens to companies of all sizes, including reduced turnover and profits, problems with collecting cash from debtors, and difficulties in renewing financial facilities. This has inevitably contributed to a number of additional challenges for auditors concerning appropriateness of going concern, the value of assets, and the greater likelihood of management fraud and manipulation of the accounts.

This course is designed to ensure that the auditor gives due thought to the relevant issues, particularly as it has been a number of years since anything comparable happened, and the problems are continuing for far longer than had been expected.

CONTENT

- The requirements of ISA 570 on Going Concern
- The content of APB Bulletin 2008/10 - Going Concern Issues during the Current Economic Conditions
- An outline of FRS 11 and the FRSSE on Impairment of Fixed Assets
- The possibilities of increased risk of material fraud as a result of management's need to achieve certain figures or to avoid breaching covenants
- The risk to the auditor of not carrying out appropriate procedures
- The ways in which the auditor/advisor may be able to assist or advise the client

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Coventry	1 Mar	15:30-18:30	Andrew Güntert
	16 Feb	15:30-18:30	Andrew Güntert

£90 plus VAT per person

Season Ticket Option Available

Back to Basics: Auditing

OBJECTIVES

By the end of the course participants will have a better understanding of how to carry out an audit under the latest rules at the three stages of planning, fieldwork and completion.

CONTENT

The course will include:

- General overview and introduction to Clarity International Standards on Auditing (UK and Ireland) and Ethical Standards
- Planning, including:
  - Appointment
  - Risk assessment procedures
  - Audit approach
- Fieldwork, including:
  - Tests of control
  - Analytical procedures
  - Other substantive tests
- Completion

Case studies and exercises will be used throughout.

CPD HOURS: 6 (Audit related: 6)

Venue	Date	Time	Speaker
Leicester	19 May	09:30-17:00	David Smith
London	7 Jun	09:30-17:00	David Smith

£120 plus VAT per person

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
High Wycombe	19 Oct	09:30-13:00	Kris Taylor

£90 plus VAT per person

Charities: Common Accounting Issues

OBJECTIVES

Accounting for charities is a complex area due to requirements laid out in both legislation and the Charities Statement of Recommended Practice (SORP).

This course will review the latest position in relation to legislative requirements as well as addressing key accounting issues arising from the SORP.

CONTENT

- Accounting requirements / thresholds of the Charities Act (Northern Ireland) 2008 and implementation dates
- Key accounting / disclosure issues arising from the SORP including:
  - Fund accounting
  - Recognition and classification of income
  - Recognition of resources expended and allocation of support costs
  - Fixed assets – functional, investments and heritage
  - Disclosure of trustees' remuneration and expenses and other related party transactions
- Content of the trustees' report, including:
  - Reserves policy
  - Risk management
  - Achievements and performance

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Belfast	25 May	13:45-16:45	David Gallagher
Londonderry	26 May	09:30-12:30	David Gallagher

£120 plus VAT per person

Season Ticket Option Available

Charities: Current Issues

available online

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 - remaining implementation issues
- Other regulatory developments and Charity Commission publications (including the latest guidance on public benefit)
- Accounting issues including SORP Information Sheets and FRS 30
- Audit and assurance issues including going concern issues, independent examinations, whistle blowing and clarified ISAs
- Topical tax issues affecting charities

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Billericay	19 May	14:00-17:15	David Gallagher
High Wycombe	24 May	14:00-17:15	David Gallagher
Lancaster	3 Oct	14:00-17:00	David Gallagher
London	9 May	14:00-17:15	David Gallagher
Manchester	11 May	14:00-17:15	David Gallagher
Norwich	17 May	13:30-16:45	David Gallagher
Oxford	9 Jun	15:30-18:30	Phil Frost
Watford	23 May	14:00-17:15	David Gallagher
York	5 May	14:00-17:15	David Gallagher

£90 plus VAT per person

Season Ticket Option Available

Common Accounting Problems

OBJECTIVES

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

CONTENT

- Determining the size of companies and groups
- The Directors' Report - Including Business Reviews
- FRS 18 Accounting policies and going concern
- FRS 5 - Reporting the substance of transactions - Including Revenue recognition
- Directors advances, credits and guarantees - 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

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Belfast *	20 Oct	09:30-12:30	Bill Telford
Birmingham	28 Sep	09:15-12:15	Phil Frost
	28 Sep	14:30-17:30	Phil Frost
Cambridge	12 Sep	15:00-18:00	John Selwood
Coventry	5 Apr	15:30-18:30	Phil Frost
	13 Apr	15:30-18:30	Phil Frost
Derby	28 Sep	14:30-17:30	John Selwood
Exeter	9 Nov	14:00-17:00	John Welsford
Leicester	8 Sep	14:00-17:00	John Selwood
	10 Oct	14:00-17:00	John Selwood
Londonderry *	19 Oct	09:30-12:30	Bill Telford
Northampton	8 Sep	09:15-12:15	John Selwood
	26 Sep	14:30-17:30	John Selwood
Nottingham	14 Sep	09:15-12:15	John Selwood
	3 Oct	14:00-17:00	John Selwood
Peterborough	17 Oct	15:00-18:00	John Selwood
Solihull	20 Apr	15:30-18:30	Phil Frost
West Bromwich	3 Nov	09:15-12:15	Phil Frost
	3 Nov	14:30-17:30	Phil Frost

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Detecting Fraud and Advising on Preventing Fraud

OBJECTIVES

This course has been designed to reflect the increased attention being given to fraud, and also to reflect the changing role of the practitioner given the further 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 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 and the possible impact of the present economic crisis
- 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
Billericay	18 Oct	14:00-17:15	Jane Everingham
Birmingham	15 Dec	09:15-12:15	John Welsford
	15 Dec	14:30-17:30	John Welsford
Derby	5 Dec	14:30-17:30	John Welsford
Glasgow	15 Feb	13:30-16:30	Andrew Güntert
Gravesend	17 Oct	14:00-17:15	John Welsford
High Wycombe	25 Oct	14:00-17:15	John Welsford
Ipswich	24 Oct	14:00-17:15	John Welsford
Leeds	26 Oct	14:00-17:15	John Welsford
Leicester	8 Dec	09:15-12:15	John Welsford
London	26 Oct	14:00-17:15	Jane Everingham
Manchester	20 Oct	14:00-17:15	Jane Everingham
Milton Keynes	20 Oct	14:00-17:15	John Welsford
Newbury	19 Oct	14:00-17:15	John Welsford
Newcastle	27 Oct	15:30-18:30	John Welsford
Northampton	14 Dec	09:15-12:15	John Welsford
Norwich	24 Oct	13:30-16:45	Jane Everingham
Nottingham	6 Dec	14:00-17:00	John Welsford
Peterborough	12 Dec	15:00-18:00	John Welsford
Stirling	14 Feb	13:30-16:30	Andrew Güntert
Sudbury	15 Sep	15:00-18:00	Andrew Güntert
Tunbridge Wells	31 Oct	14:00-17:15	John Welsford
Watford	18 Oct	14:00-17:15	John Welsford
West Bromwich	7 Dec	14:30-17:30	John Welsford

£90 plus VAT per person

Season Ticket Option Available

Effective Analytical Procedures for the Business Adviser

OBJECTIVES

ISA 520 imposes mandatory requirements for the use of analytical procedures by auditors.

Regulatory reviews, from QAD and AIU, regularly criticise the application of this ISA.

Analytical procedures should form a cost-effective basis for the auditor's opinion, and if used effectively, can reduce the amount of detailed substantive testing required, and provide useful advice for the client.

In addition analytical procedures form a key element of non-audit limited assurance engagements and underpin financial statement preparation assignments. Finally they provide useful insights into the client's business so that the business adviser can assist management to improve profitability, financial positions etc.

CONTENT

- The auditor and analytical procedures:
  - As a risk assessment and planning tool
  - As a substantive procedure
  - At the completion and review stage
- Analytical procedures and limited assurance and compilation assignments
- The available techniques:
  - Key ratios and performance indicators
  - Building expectations
  - Investigating and corroborating variances
  - Drawing conclusions
  - Reporting
- Providing constructive advice within auditor ethical standards

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Aberdeen	2 Jun	13:30-16:30	Bill Telford
Belfast *	20 Oct	13:45-16:45	Bill Telford
Edinburgh	1 Jun	13:30-16:30	Bill Telford
Glasgow	31 May	13:30-16:30	Bill Telford
Londonderry *	19 Oct	13:45-16:45	Bill Telford

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Gaining Benefit from Effective Assignment Review and Close Down

OBJECTIVES

Do you ever spend too long closing down assignments? Do your review procedures detect the same weaknesses time after time? Do your close down routines ever fail to focus on your client?

If the answers are yes, you are certainly not alone, many firms suffer from significant inefficiencies during their completion procedures.

This course provides an opportunity to explore your own close down procedures, become aware of the most common weaknesses and more importantly learn tips and techniques from firms who have taken action to improve.

CONTENT

The course provides minimal technical input in view of the nature of the subject and is more concerned with method and approach. It will include guidance on:

- How to measure turnaround time and set targets to improve
- Training reviewers and ensuring reviewees see reviews as a positive experience
- Using the completion process to add value to assignments
- Making the most of IT tools and processes within the completion process
- Ensuring analytical review is valuable to the firm and the client
- Benefiting from points forward as part of a cycle of improvement
- Monitoring budgets and pricing appropriately
- Linking review results to personal development plans.

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Oxford	6 Oct	15:30-18:30	Jane Everingham

£90 plus VAT per person

Season Ticket Option Available

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
Edinburgh	18 Oct	09:30-12:30	Phil Frost

£120 plus VAT per person

IFRS Update and Refresher

OBJECTIVES

Some companies are already required, either by legislation or by their parent company, to adopt International Accounting Standards (IFRSs). Others have the choice between UK GAAP and IFRSs. This course focuses on the differences between UK and International Accounting Standards and will look at situations where companies must adopt IFRSs or when they might benefit from adoption.

In addition, the course will include recent changes to IFRS. It will also address practical examples of common issues encountered by those adopting IFRSs.

CONTENT

- What UK companies can and can't do regarding adoption of IFRSs
- The key differences between UK GAAP and IFRSs
  - Balance sheet
  - Profit and loss account / income statement
  - Disclosures in notes
- Recent and prospective changes to IFRSs
- First time adoption – IFRS 1
- Common issues in applying IFRSs
  - Financial instruments
  - Cash flow statements
  - Impairment reviews
  - Intangibles
  - Related party transactions
  - Interim reporting

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Birmingham	9 May	14:00-17:00	Phil Frost
Leeds	25 May	14:00-17:00	Phil Frost
London	19 May	14:00-17:00	Phil Frost

£120 plus VAT per person

Introduction to Limited Liability Partnerships

OBJECTIVES

This course will provide participants with an introduction to the nature of Limited Liability Partnerships (LLPs), as well as the accounting and auditing implications, particularly those resulting from the latest SORP.

CONTENT

- What is an LLP?
- Choice of business structure and the implications
- Accounting requirements for LLPs
- The SORP for LLPs, including key changes introduced
- Audit implications

The course will be a combination of lecturing, case studies, discussions and questions designed to promote discussion and participation during the course. It will also incorporate the use of documentation from our Specialist Assignment Manual (SAM) for LLPs.

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
London	19 May	14:00-17:00	Hannah Howe
Nottingham	4 May	14:00-17:00	Hannah Howe

£90 plus VAT per person

Introduction to Solicitors' Accounts Rules

OBJECTIVES

The report required by the SRA 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 SRA 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

This course will cover:

- 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
Exeter	16 Feb	09:30-16:30	Sally Hutchings
High Wycombe	13 Jan	09:30-17:15	Sally Hutchings
	13 Jan	09:30-17:15	Sally Hutchings
Leicester	21 Feb	09:30-17:00	Sally Hutchings
London	10 Mar	09:30-17:00	Sally Hutchings

£120 plus VAT per person

Laws & 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 250A 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.

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
Billericay	23 Jun	14:00-17:15	Andrew Güntert
Bracknell	7 Jun	09:30-12:45	Andrew Güntert
High Wycombe	6 Jul	14:00-17:15	Andrew Güntert
Leeds	15 Jun	14:00-17:15	Andrew Güntert
London	27 Jun	14:00-17:15	Andrew Güntert
Milton Keynes	12 Jul	14:00-17:15	Andrew Güntert
Newcastle	16 Jun	15:30-18:30	Andrew Güntert
Norwich	13 Jul	13:30-16:45	Andrew Güntert

£90 plus VAT per person

Season Ticket Option Available

Limited Liability Partnerships

OBJECTIVES

LLPs have now been with us for nearly 10 years and over 25,000 have been formed. Although the Profession was wary in the early days, LLPs are now seen as a genuine option as a business vehicle. However, the decision to operate as an LLP or to convert to an LLP is not a simple one. The law, regulations and accounting requirements relating to LLPs are complex.

The extremely complex SORP relating to LLPs includes requirements that are positively counter intuitive but the course will clear the confusion. The SORP is revised for years to December 2010 and the highly complex amendments will be explained.

CONTENT

Brief introduction to LLPs

Advantages of an LLP

The accounting for LLPs

- The legal requirements - CA 2006 implications
- The content of the accounts
- Audit and filing requirements

LLP SORP

- Main implications of the SORP
- Allocation of profits
- Members remuneration and capital
- Members annuities
- Changes introduced by the new SORP

The taxation of LLPs

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Glasgow	28 Sep	09:30-12:30	John Welsford
London	7 Mar	09:30-12:30	John Welsford
Manchester	21 Mar	14:00-17:00	John Welsford
Nottingham	2 Mar	14:00-17:00	John Welsford

£120 plus VAT per person

Money Laundering Update

available online

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, there are doubts whether these are being applied 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. Regulators would expect these Regulations to be complied with. 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 identify checks
  - what is a risk based approach?
  - what the JMLSG say
  - the CCAB guidance
- Interaction with other rules and regulations, ISAs and professional ethics
- Practical consequences of the first few years

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Glasgow	8 Dec	09:30-12:30	David Gallagher
High Wycombe	8 Nov	09:30-12:45	Andrew Güntert

£120 plus VAT per person

Practical Problems with Solicitors' Accounts Rules

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.

The rules are very complex, and as such non-compliance with the rules will be an issue for the majority of reporting accountants. However, knowledge of the rules will not be sufficient to ensure that all breaches are identified. Additionally, anyone undertaking this type of assignment must have a sound practical understanding of how to identify breaches. On completion of this course participants will be aware of the problems that they should be looking for when completing the fieldwork.

CONTENT

The content is a workshop based format involving discussion and practical examination via case studies, of examples of non-compliance with the rules including:

- problems with bank reconciliations
- mistreatment of disbursements - professional and other
- transfers of costs and withdrawals from client account
- handling of money held in trust
- payment of interest
- identification and treatment of breaches

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Lancaster	16 Mar	09:30-13:00	Sally Hutchings
London	19 May	09:30-12:30	Andrew Paul
Nottingham	4 May	09:30-12:30	Andrew Paul

£90 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.

Finally the course will review the changes being proposed to the rules.

CONTENT

This course will concentrate on these organisations and will cover the following areas:

- SAR 98 - changes introduced in July 2008 and March 2009
- An overview of changes to be introduced later this year
- 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
High Wycombe	7 Sep	09:30-12.45	John Welsford
Leeds	7 Feb	14:00-17:00	John Welsford
Leicester	17 Feb	09:30-12:30	John Welsford
London	14 Apr	09:30-12:30	John Welsford
Sheffield	10 Mar	14:00-17:00	John Welsford

£120 plus VAT
per person

The Link between Accounting Standards & Tax Treatment

OBJECTIVES

In the last few years, as a result of both changes in legislation and decisions in court cases, tax treatments have become increasingly aligned with UK GAAP (Generally Accepted Accounting Practice). This change has applied to both incorporated and unincorporated businesses.

As a result of appointing a number of qualified accountants, HMRC has improved its ability to understand accounting treatments and is more likely to question treatments adopted, for example to question a particular accounting policy.

This course will consider the practical application of the changes and help practitioners to be confident they can demonstrate that their clients' accounts, whether those of a company, a sole trader or a partnership, are prepared in accordance with generally accepted accounting practice.

CONTENT

Among other areas the course will cover:

- What is UK GAAP and how is it determined?
- Developments in tax statutes from the FA 1998 onwards, subsequent tax legislation, and the true and fair view.
- HMRCs Business Income Manual addressing the issues of accounting treatments and tax treatments and illustrating this with practical examples in the Manual

Important court decisions such as:

- Gallagher v Jones
- Britannia Airways
- Herbert Smith

The specific tax impact of standards such as intangibles, impairment, provisions and tangible fixed assets, including the tax impact of prior period adjustments, and particular issues such as revenue recognition and payments for pension costs.

The tax charge in the accounts as required by FRS 16 on Current Tax and FRS 19 on Deferred Tax and the correct treatment of tax losses in accounts.

The effects of using International Financial Reporting Standards and the likely impact of the Financial Reporting Standard for Medium-sized Entities.

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Bristol	22 Jun	13:45-16:45	Andrew Güntert

£90 plus VAT
per person

Season Ticket
Option Available

The Reporting Requirements of Small Companies

OBJECTIVES

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

CONTENT

- Small company status
- Statutory and abbreviated accounts
- Filing obligations
- Small groups
- Audit exemption
- Compilation and Assurance Reports
- Key differences between FRSSE and the full accounting standards
- Directors' reports and accounting policies
- Directors and related party transactions and disclosure
- Common problems

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Aberdeen	17 Oct	13:30-16:30	Phil Frost
Billericay	4 Oct	14:00-17:15	Phil Frost
Bracknell	10 May	09:30-12:45	Phil Frost
Edinburgh	18 Oct	13:30-16:30	Phil Frost
Glasgow	20 Oct	13:30-16:30	Phil Frost
Gravesend	27 Sep	14:00-17:15	Phil Frost
Hatfield	13 Oct	14:00-17:15	Mike Ulrich
High Wycombe	17 Oct	14:00-17:15	Mike Ulrich
Ipswich	11 Oct	09:30-12:45	Mike Ulrich
	11 Oct	14:00-17:15	Mike Ulrich
Leeds	13 Oct	14:00-17:15	Phil Frost
London	10 Oct	14:00-17:15	Phil Frost
Manchester	12 Oct	14:00-17:15	Phil Frost
Milton Keynes	8 Sep	14:00-17:15	Mike Ulrich
Newbury	22 Sep	14:00-17:15	Mike Ulrich
Newcastle	22 Sep	15:30-18:30	Phil Frost
Norwich	10 Oct	13:30-16:45	Mike Ulrich
Southend	11 Oct	14:00-17:15	Phil Frost
Stirling	19 Oct	13:30-16:30	Phil Frost
Tunbridge Wells	26 Sep	14:00-17:15	Phil Frost
Walsall	16 Jun	14:00-17:00	John Welsford
Watford	5 Oct	14:00-17:15	Phil Frost
York	21 Sep	14:00-17:15	Phil Frost

£90 plus VAT per person

Season Ticket Option Available

Top Tips for Delivering the Profitable Assignment

OBJECTIVES

The course is an opportunity for the practitioner to focus on the ways in which assignments can be made more profitable. Most courses concentrate on technical aspects and neglect other essential aspects. This course will address some technical issues but in the context of other areas the practice needs to consider.

CONTENT

Objectives for the assignment
- What do your clients need?
- What do you need?

Efficiency and effectiveness of the work
- Gaining benefit from time spent planning
- Using technology better
- Going for minimum not maximum compliance with the rules

Finalisation procedures
- What goes wrong?
- Improving review procedures

Administrative procedures
- Budgeting, ensuring this plans for profit
- Timetabling key elements of all assignments
- Billing the right amount at the right time
- Measuring performance indicators that matter

Managing people and work
- Planning with the resources you have, not those you dream of!
- Managing and motivating your team

CPD HOURS: 3 (Audit related: 3)

Venue	Date	Time	Speaker
Lancaster	23 May	14:00-17:00	Phil Frost

£90 plus VAT per person

Season Ticket Option Available

Acting for Farmers: An Update

OBJECTIVES

This course aims to give participants a general understanding of farmer clients, the pressures they are under and how we act for them. It will consider the accounting aspects as well as the planning opportunities associated with the taxation of farmers. The single farm payment will be under amendment and we will need to look at this.

CONTENT

- Accounting problems
  - Grants, subsidies and single farm payment
  - Topical points
- Taxation and farms
  - Averaging, losses and hobby farming
  - Capital allowances
  - Dealing with, but preferably avoiding, investigations
  - The taxation of grants etc
  - Farmhouses
  - Capital gain and inheritance tax including rollover and entrepreneurs' relief for farmers. APR and BPR will also be considered
  - Value added tax and how it affects farmers
- Structures, successions, sales and other planning points

CPD HOURS: 3

Venue	Date	Time	Speaker
Bristol	15 Mar	13:45-16:45	Bob Trunchion
Coventry	17 Jun	09:30-12:30	Bob Trunchion
Exeter	6 Jul	14:00-17:00	Bob Trunchion
Lancaster	28 Feb	14:00-17:00	Bob Trunchion
Sheffield	17 Mar	14:00-17:00	Bob Trunchion

£120 plus VAT per person

Advanced Aspects of Corporation Tax

OBJECTIVES

A review of some of the more complex areas of corporation tax and areas of particular relevance to companies

CONTENT

Loan relationships and trading debts

- Main principles
- Special cases
- Loan transactions between company and individuals

Profit extraction - problem areas

- Income splitting
- Application of the transaction in securities legislation

Intangible asset regime

- Goodwill write offs
- Rollover regime

Corporation tax relief for employee share acquisitions

- Availability of the relief

Corporate reorganisations

- Transfers of trade – points to watch
- Transfer of capital assets – recent developments
- Substantial shareholding exemption

CPD HOURS: 3

Venue	Date	Time	Speaker
Coventry	8 Mar	15:30-18:30	Phil Williams
	24 Mar	15:30-18:30	Phil Williams

£90 plus VAT per person

Season Ticket Option Available

Back to Basics: Expenses and Benefits

OBJECTIVES

By the end of the course participants will have consolidated their existing knowledge and will be able to prepare forms P11D and deal with expenses issues with confidence.

CONTENT

- Review of benefits
- Expenses
- PAYE Settlement Agreements
- National Insurance issues

Case studies may be used as appropriate.

Participants should bring a calculator.

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	14 Jun	14:00-17:00	Shan Hughes
London	12 May	14:00-17:00	Shan Hughes
Nottingham	24 May	14:00-17:00	Shan Hughes

£90 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

Participants should bring a calculator.

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast	9 Jun	13:45-16:45	Pat Nown
Stirling	11 May	09:30-13:00	Pat Nown

£120 plus VAT per person

Back to Basics: Personal Tax

OBJECTIVES

By the end of the course participants will have consolidated their existing knowledge and will be able to prepare personal tax computations and advise clients on payments on account.

CONTENT

- Taxable income
- Rates and allowances
- Reliefs – including the treatment of pension payments and charitable giving
- Basic capital gains tax computations
- Tax computations
- Payment of tax

Case studies will be used throughout.

Participants should bring a calculator.

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	14 Jun	09:30-12:30	Shan Hughes
London	12 May	09:30-12:30	Shan Hughes
Nottingham	24 May	09:30-12:30	Shan Hughes

£90 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

Participants should bring a calculator.

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast	9 Jun	09:30-12:30	Pat Nown
Stirling	11 May	13:30-16:30	Pat Nown

£120 plus VAT per person

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	19 Oct	14:00-17:15	Kris Taylor

£90 plus VAT per person

Budget 2011

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
Glasgow	13 Apr	09:30-12:30	Andrew Burgess
High Wycombe	30 Mar	14:00-17:15	Mark Ward
Leicester	29 Mar	14:00-17:00	Mark Ward

£120 plus VAT per person

Business Tax: Problem Areas

available online

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. It will draw on published HMRC material and on recently-decided cases.

CONTENT

- Profit computations - expense deductions including interest relief and whether expenditure is repairs or capital
- 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
Birmingham	26 May	09:15-12:15	Phil Williams
	26 May	14:30-17:30	Phil Williams
Cambridge	17 May	15:00-18:00	Phil Williams
Derby	8 Jun	14:30-17:30	Phil Williams
Exeter	23 Jun	14:00-17:00	Phil Williams
Lancaster	9 Jun	14:00-17:00	Phil Williams
Leicester	11 May	09:15-12:15	Phil Williams
	24 May	14:00-17:00	Phil Williams
Northampton	19 May	09:15-12:15	Phil Williams
	7 Jun	14:30-17:30	Phil Williams
Nottingham	12 May	14:00-17:00	Phil Williams
	25 May	09:15-12:15	Phil Williams
Peterborough	4 May	15:00-18:00	Phil Williams
West Bromwich	10 May	09:15-12:15	Phil Williams
	10 May	14:30-17:30	Phil Williams

£90 plus VAT per person

Season Ticket Option Available

Business Valuations

OBJECTIVES

In the current climate, as business advisers, you will regularly be asked by clients to value their business. This course will provide you with an understanding of the fundamental concepts of valuation, issues arising, the differences in approach for tax and other purposes and how to minimise your risk when undertaking this work.

CONTENT

- Valuation principles and methodologies
- Goodwill
- Recent valuation cases - non-fiscal
- Commercial v fiscal valuation
- Employee shares since ITEPA 2003
- Recent valuation cases - fiscal

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	21 Mar	14:30-17:30	David Bowes
Derby	14 Mar	14:30-17:30	David Bowes
Leicester	5 Apr	09:15-12:15	David Bowes
Northampton	22 Mar	09:15-12:15	David Bowes
Nottingham	17 Mar	14:00-17:00	David Bowes
Peterborough	4 Apr	15:00-18:00	David Bowes
West Bromwich	7 Apr	14:30-17:30	David Bowes

£90 plus VAT per person

Season Ticket Option Available

Capital Gains Tax - A Current Perspective

OBJECTIVES

This course will provide a refresher of key issues in CGT planning as well as considering the impact of recent changes such as Entrepreneurs' Relief.

CONTENT

- 10 basic things to remember about CGT
- Key planning issues on Entrepreneurs' Relief
- Other CGT issues on selling shares
  - Share exchanges
  - Loan notes
  - Earn outs
- Rollover and deferral reliefs

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	26 Oct	14:00-17:00	Pat Nown
High Wycombe	21 Jun	09:30-12:45	Andrew Burgess

£120 plus VAT per person

Capital Taxes - Recent Developments

OBJECTIVES

From a Capital Gains Tax (CGT) perspective it is vital to maximise Entrepreneurs' Relief and achieve a 10% tax rate so this course will include a refresher on the pitfalls and planning areas as well as any recent developments in this area. The significant gap which exists between CGT rates, particularly the 10% rate and the top rate of income tax provides an incentive to plan for capital but also means that HMRC may look more closely at their anti avoidance legislation.

On the Inheritance Tax side, ensuring key reliefs such as BPR are both secured and used remains a key area of planning both during lifetime and at death. In addition the freezing of the nil rate band until 2015 prompts a revisit to the area of essential lifetime planning including almost by default a review of certain trust fundamentals as they play a vital role in capital taxes planning.

CONTENT

- Entrepreneurs' Relief to include:
  - Problem areas
  - Planning opportunities
- Anti avoidance legislation
  - Land
  - Securities
- IHT reliefs
  - Securing BPR and APR
  - Using reliefs
- Essential IHT lifetime planning
- Points from recent cases and developments

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	12 Apr	13:30-16:30	Andrew Burgess
Birmingham	20 Jun	14:30-17:30	Pat Nown
Cambridge	16 Jun	15:00-18:00	Pat Nown
Colchester	16 Feb	15:30-18:30	Pat Nown
Derby	21 Jun	14:30-17:30	Pat Nown
Edinburgh	11 Apr	13:30-16:30	Andrew Burgess
Glasgow	13 Apr	13:30-16:30	Andrew Burgess
Leicester	13 Jun	14:00-17:00	Pat Nown
	23 Jun	09:15-12:15	Pat Nown
Northampton	15 Jun	09:15-12:15	Pat Nown
	28 Jun	14:30-17:30	Pat Nown
Nottingham	14 Jun	09:15-12:15	Pat Nown
	27 Jun	14:00-17:00	Pat Nown
Peterborough	6 Jun	15:00-18:00	Pat Nown
Sheffield	18 May	16:00-19:00	Andrew Burgess
	24 May	14:00-17:00	Andrew Burgess
West Bromwich	29 Jun	09:15-12:15	Pat Nown
	29 Jun	14:30-17:30	Pat Nown

£90 plus VAT per person

Season Ticket Option Available

Corporation Tax Update

OBJECTIVES

This course will review some of the special areas of taxation applicable only to companies. It will include the position for individuals where relevant in their position as shareholders and directors.

CONTENT

- Matters affecting the corporation tax charge
  - Associated companies
  - Recent developments
- Loans and trading debts
  - Loan relationships principles
  - Loans and trade debts write offs
  - Loans between company and participator
- Intangible asset regime
  - Principles
  - Goodwill write off – is it available?
  - Rollover relief
- Profit extraction
  - Current issues
- Purchase of own shares
  - Principles

CPD HOURS: 3

Venue	Date	Time	Speaker
Walsall	18 May	14:00-17:00	Pat Nown
High Wycombe	5 Oct	14:00-17:15	Phil Williams

£120 plus VAT per person

Finance Act 2011

available online

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 the 2011/12 tax year

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	12 Sep	13:30-16:30	Phil Williams
Belfast *	7 Sep	09:30-12:30	Mark Morton
Billericay	7 Sep	14:00-17:15	Pat Nown
Birmingham	6 Sep	09:15-12:15	Norman Allison
	6 Sep	14:30-17:30	Norman Allison
Bracknell	13 Oct	09:30-12:45	Norman Allison
Bristol	21 Sep	09:30-12:30	Andrew Burgess
	21 Sep	13:45-16:45	Andrew Burgess
Cambridge	28 Sep	15:00-18:00	Norman Allison
Derby	20 Sep	14:30-17:30	Dean Wootten
Edinburgh	13 Sep	13:30-16:30	Phil Williams
Exeter	20 Sep	14:00-17:00	Andrew Burgess
Glasgow	15 Sep	13:30-16:30	Phil Williams
Gravesend	8 Sep	14:00-17:15	Pat Nown
Hatfield	27 Sep	14:00-17:15	Norman Allison
High Wycombe	22 Sep	09:30-12:45	Pat Nown
	22 Sep	14:00-17:15	Pat Nown
Ipswich	20 Sep	09:30-12:45	Pat Nown
	20 Sep	14:00-17:15	Pat Nown
Lancaster	14 Sep	14:00-17:00	Mark Morton
Leeds	7 Sep	14:00-17:15	Norman Allison
Leicester	21 Sep	09:15-12:15	Dean Wootten
	21 Sep	14:00-17:00	Dean Wootten
	29 Sep	14:00-17:00	Dean Wootten
London	26 Sep	09:30-12:45	Norman Allison
	26 Sep	14:00-17:15	Norman Allison
Londonderry *	6 Sep	09:30-12:30	Mark Morton
Manchester	21 Sep	14:00-17:15	Norman Allison
Milton Keynes	21 Sep	14:00-17:15	Pat Nown
Newbury	12 Sep	14:00-17:15	Pat Nown
Newcastle	8 Sep	15:30-18:30	Norman Allison
Northampton	14 Sep	09:15-12:15	Norman Allison
	3 Oct	14:30-17:30	Norman Allison
Norwich	19 Sep	13:30-16:45	Pat Nown
Nottingham	5 Sep	14:00-17:00	Norman Allison
	22 Sep	09:15-12:15	Norman Allison
Oxford	8 Sep	15:30-18:30	Mark Morton
	19 Sep	15:30-18:30	Mark Morton
Peterborough	22 Sep	15:00-18:00	Dean Wootten
Southend	15 Sep	14:00-17:15	Pat Nown
Stirling	14 Sep	13:30-16:30	Phil Williams
Tunbridge Wells	12 Sep	14:00-17:15	Norman Allison
Watford	20 Sep	14:00-17:15	Norman Allison
West Bromwich	19 Sep	09:15-12:15	Norman Allison
	19 Sep	14:30-17:30	Norman Allison
York	13 Sep	14:00-17:15	Norman Allison

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Finance Bill 2011

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 2011/12 tax year

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	5 Jul	15:00-18:00	Phil Williams
Colchester	16 Jun	15:30-18:30	Mark Morton
Coventry	25 May	15:30-18:30	Mark Morton
	7 Jun	15:30-18:30	Mark Morton

£90 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
Lancaster	5 Apr	14:00-17:00	Pat Nown

£90 plus VAT per person

Season Ticket Option Available

Inheritance Tax Planning including Trusts

available online

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
Billericay	8 Jun	14:00-17:15	Andrew Burgess
Bracknell	7 Jun	14:00-17:15	Andrew Burgess
Gravesend	23 Jun	14:00-17:15	Andrew Burgess
High Wycombe	21 Jun	14:00-17:15	Andrew Burgess
Ipswich	28 Jun 28 Jun	09:30-12:45 14:00-17:15	Andrew Burgess Andrew Burgess
Lancaster	1 Nov	14:00-17:00	Andrew Burgess
Leeds	6 Jul	14:00-17:15	Andrew Burgess
London	6 Jun	14:00-17:15	Andrew Burgess
Manchester	5 Jul	14:00-17:15	Andrew Burgess
Milton Keynes	30 Jun	14:00-17:15	Andrew Burgess
Newbury	29 Jun	14:00-17:15	Andrew Burgess
Newcastle	7 Jul	15:30-18:30	Andrew Burgess
Norwich	27 Jun	13:30-16:45	Andrew Burgess
Southend	4 Jul	14:00-17:15	Andrew Burgess
Tunbridge Wells	20 Jun	14:00-17:15	Andrew Burgess
Watford	16 May	14:00-17:15	Andrew Burgess

£90 plus VAT per person

Season Ticket Option Available

Partnership Tax Planning

OBJECTIVES

Partnership remains a flexible manner in which to carry on a trade or profession, enabling the interests of the individual to be balanced against those of the trade (or profession). Under self assessment, each partner is treated as carrying on his or her own business. However there are commercial and fiscal pressures on partnerships to make the most efficient use of the existing structure and to consider others, notably a corporate structure or the merger of practices.

This course will review the income and capital gains tax rules before considering the current issues for both partners and partnerships. The emphasis will be on identifying the areas in which planning opportunities and pitfalls lurk.

CONTENT

- Income tax - basic issues and current problem areas
- Incorporation or not?
- The settlements question
- Limited Liability Partnerships
- Admissions, retirements, mergers and splits
- Capital taxes issues

CPD HOURS: 3

Venue	Date	Time	Speaker
High Wycombe	15 Nov	14:00-17:15	Brian Ogilvie

£120 plus VAT per person

Payroll Update

OBJECTIVES

To ensure participants are aware of current payroll issues and recent changes in legislation and procedures.

CONTENT

Recent developments, including a review of:

- Recent changes in legislation affecting PAYE and NIC
- Online filing
- SSP, SMP and SPP

Case studies may be used as appropriate.

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	8 Apr	09:30-12:30	Shan Hughes
Bristol	29 Mar	13.30-17:00	Shan Hughes
Exeter	30 Mar	09:30-13:00	Shan Hughes
High Wycombe	9 Feb	09:30-12:45	Christina Campbell
Leicester	31 Mar	14:00-17:00	Shan Hughes
London	3 Mar	14:00-17:00	Shan Hughes
Sheffield	14 Mar	09:30-13:00	Christina Campbell

£90 plus VAT per person

PAYE, Benefits & NI 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. It will also identify how to address the potential difficulties which may arise.

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
Aberdeen	14 Mar	13:30-16:30	Pat Nown
Belfast *	6 Apr	13:45-16:45	Andrew Burgess
Billericay	24 Feb	14:00-17:15	Mark Morton
Bracknell	10 May	14:00-17:15	Mark Morton
Bristol	7 Apr	13:45-16:45	Pat Nown
Edinburgh	15 Mar	13:30-16:30	Pat Nown
Glasgow	22 Mar	13:30-16:30	Pat Nown
Gravesend	28 Feb	14:00-17:15	Mark Morton
Hatfield	15 Mar	14:00-17:15	Mark Morton
High Wycombe	14 Mar	14:00-17:15	Mark Morton
Ipswich	8 Mar 8 Mar	09:30-12:45 14:00-17:15	Mark Morton Mark Morton
Leeds	16 Feb	14:00-17:15	Mark Morton
London	21 Feb	14:00-17:15	Mark Morton
Londonderry *	5 Apr	13:45-16:45	Andrew Burgess
Manchester	23 Feb	14:00-17:15	Mark Morton
Milton Keynes	15 Feb	14:00-17:15	Mark Morton
Newbury	1 Mar	14:00-17:15	Mark Morton
Newcastle	17 Feb	15:30-18:30	Mark Morton
Norwich	7 Mar	13:30-16:45	Mark Morton
Southend	8 Feb	14:00-17:15	Mark Morton
Stirling	21 Mar	13:30-16:30	Pat Nown
Tunbridge Wells	14 Feb	14:00-17:15	Mark Morton
Watford	22 Feb	14:00-17:15	Mark Morton

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Personal Tax Planning: Current Issues

OBJECTIVES

The tax planning scene for individuals is dominated currently by the 50% top rate of income tax. Clearly this has an impact on many individuals but some find themselves in the position of being capital rich but income poor. This course will focus on a number of key areas relating to both income and capital tax planning issues that are likely to affect a significant number of key clients.

CONTENT

Dealing with the 50% rate
- Is incorporation an option?
- Does income shifting present any opportunities?
- Are there any viable tax shelters?

Going non resident
- How to plan a successful departure
- Making a job abroad a tax effective option
- Taking advantage of non residence to make capital gains

Is recession a good time to do lifetime IHT planning?
- Persuading clients to make gifts
- Use the exemptions
- Insurance plans and IHT
- Is the family trust an option to consider?

Property investment
- Tax planning issues to consider

Other investment vehicles
- A review of the main investment areas from a tax efficiency perspective

Making the most of charitable giving options

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast *	6 Apr	09:30-12:30	Andrew Burgess
Birmingham	28 Feb	09:15-12:15	Andrew Burgess
	28 Feb	14:30-17:30	Andrew Burgess
Cambridge	17 Feb	15:00-18:00	Andrew Burgess
Derby	16 Feb	14:30-17:30	Andrew Burgess
Leicester	14 Feb	14:00-17:00	Andrew Burgess
	10 Mar	09:15-12:15	Andrew Burgess
Londonderry *	5 Apr	09:30-12:30	Andrew Burgess
Northampton	9 Feb	09:15-12:15	Andrew Burgess
	10 Mar	14:30-17:30	Andrew Burgess
Nottingham	16 Feb	09:15-12:15	Andrew Burgess
	3 Mar	14:00-17:00	Andrew Burgess
Peterborough	14 Mar	15:00-18:00	Andrew Burgess
Solihull	17 Mar	15:30-18:30	Andrew Burgess
Walsall	22 Mar	14:00-17:00	Andrew Burgess
West Bromwich	15 Feb	09:15-12:15	Andrew Burgess
	15 Feb	14:30-17:30	Andrew Burgess

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

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
Colchester	4 Apr	15:30-18:30	Jonathan Wilkey
Middlesbrough	18 May	14:00-17:00	Jonathan Wilkey
Walsall	10 Mar	14:00-17:00	Jonathan Wilkey

£90 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
Belfast	22 Sep	13:45-16:45	David Craddock

£120 plus VAT per person

Tax Credits Workshop

OBJECTIVES

This workshop style session mainly aims to explain the current rules and workings governing the UK working and child tax credit system. It will include worked exercises and calculations.

However it will also cover an introduction to developments in the new Universal Credit system.

It is intended for all accountants in general practice who require an essential understanding of the mechanics of the tax credit system when advising individuals in connection with their tax affairs.

CONTENT

Course content may vary depending on the continued developments in this area but will include:

- Eligibility for tax credits
- Definition and calculation of income
- Calculating awards
- Claim procedures and limits
- Changes in personal circumstances and income
- Overpayments and recovery
- Enquiries and appeals
- Penalties
- Overview of entitlements to other state benefits
- The Universal Tax Credit

CPD HOURS: 3

Venue	Date	Time	Speaker
Exeter	12 Dec	14:00-17:00	Pat Nown

£90 plus VAT per person

Season Ticket Option Available

Tax Implications of Marriage, Cohabitation, Separation and Divorce

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
Exeter	23 May	14:00-17:00	Andrew Burgess

£90 plus VAT per person

Season Ticket Option Available

Tax Issues for Charities

OBJECTIVES

The UK direct tax system provides many significant benefits for charitable organisations. Those benefits are not unlimited and need to be exercised with care otherwise they can cause serious problems. This course will identify the key tax benefits and highlight the areas where problems can arise for the unwary or the careless. The course will not deal with VAT issues as they affect charities.

CONTENT

The basic tax exemption

- What is it?
- The extension into Europe
- The problem when things go wrong

Trading by charities

- Identifying that there is a trade
- The trading exemptions
- Dealing with fundraising events

Using a trading subsidiary

- How it works in theory
- Where the problems can arise in practice

Gift Aid

- Getting the admin right
- Taking full advantage of the relief
- Identifying and tackling the problem of benefits

Other tax efficient giving

- Payroll giving
- Gifts of shares and land
- Legacies

CPD HOURS: 3

Venue	Date	Time	Speaker
Birmingham	20 May	09:30-12:30	Andrew Burgess
London	19 Apr	14:00-17:00	Andrew Burgess

£120 plus VAT per person

Tax Issues for Expatriate Employees

OBJECTIVES

International mobility is a key feature of employment in 21st century. The tax issues that arise from this affect both individual employees and their employers. They relate not just to the calculation of liability but to practical issues on the operation of PAYE and how double taxation agreements (DTAs) impact.

This course will identify the key issues of which advisors need to be aware in advising clients. It will look at the issue purely from the perspective of the United Kingdom.

CONTENT

Residence and ordinary residence
- General principles for determining status of employees
- Specific issues to consider on arrival or departure

Domicile
- Importance of determination

General principles of liability for employees
- General charge
- Specific issues for non doms
- Issues to look out for on expenses and benefits

Outline of impact of DTAs
- Impact of dependant services article
- Practical impact for UK employers

Introduction to NIC
- Summary of rules relating to EU
- Issues where reciprocal agreements exist
- Issues relating to other countries

CPD HOURS: 3

Venue	Date	Time	Speaker
Aberdeen	12 Apr	09:30-12:30	Andrew Burgess
Bristol	17 May	14:00-17:00	Andrew Burgess
Coventry	18 Apr	14:00-17:00	Andrew Burgess
Leeds	7 Apr	14:00-17:00	Andrew Burgess
London	19 Apr	09:30-12:30	Andrew Burgess

£120 plus VAT per person

Tax Planning for Family Companies

OBJECTIVES

The aim of the course is not just to remind participants of the current rules governing the tax of family companies but also the traps. It is also to make sure that they are aware of how all the new developments in tax etc fit into the advice given daily to clients.

This course looks at the life of the average family business from set up to sale from a taxation point of view.

CONTENT

- Incorporation
  - the pros and cons of incorporating
  - the mechanics of incorporation
  - should we incorporate?
- Corporation tax planning
- Financing the company
  - sources of finance available
  - their tax implications
- Close company provisions
- Extracting funds from the company
- Provision of pensions
- Capital tax planning

The course will include a number of case studies to illustrate the relevant points.

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	3 May	14:00-17:15	Bob Trunchion
Bracknell	13 Oct	14:00-17:15	Martyn Ingles
Gravesend	26 May	14:00-17:15	Martyn Ingles
Hatfield	16 Jun	14:00-17:15	Martyn Ingles
High Wycombe	5 May	14:00-17:15	Martyn Ingles
Ipswich	17 May	09:30-12:45	Martyn Ingles
	17 May	14:00-17:15	Martyn Ingles
Leeds	24 May	14:00-17:15	Pat Nown
London	23 May	14:00-17:15	Bob Trunchion
Manchester	25 May	14:00-17:15	Pat Nown
Milton Keynes	9 May	14:00-17:15	Martyn Ingles
Newbury	12 May	14:00-17:15	Martyn Ingles
Newcastle	16 May	15:30-18:30	Pat Nown
Norwich	9 Jun	13:30-16:45	Martyn Ingles
Oxford	19 Oct	15:30-18:30	Phil Williams
	1 Nov	15:30-18:30	Phil Williams
Solihull	18 May	15:30-18:30	Phil Williams
Southend	13 Jun	14:00-17:15	Martyn Ingles
Tunbridge Wells	16 May	14:00-17:15	Bob Trunchion
Watford	27 Jun	14:00-17:15	Bob Trunchion
York	17 May	14:00-17:15	Pat Nown

£90 plus VAT per person

Season Ticket Option Available

Tax Planning for Higher Earners

OBJECTIVES

The 2010/11 tax year saw the introduction of the 50% band and the reduction in personal allowance for high earners. Changes in pension relief are relevant for 2010/11 and 2011/12.
As a result high earners will need to consider the options open to them to mitigate the effect of these changes and HMRC will also consider their response to planning issues.

This course will provide details of the changes and consider the planning options which may be open.

CONTENT

- The basic impact of the changes and planning a strategy
- Changes in pension contributions
  - the special annual allowance charge
  - the abolition of relief above the basic rate
- Likely areas of HMRC attack
  - adventure in nature of trade
  - land transactions
  - transactions in securities
- Going non resident
  - the conditions
  - the impact of Gaines-Cooper
- Incorporation
- Income extraction
- Investment strategy.

CPD HOURS: 3

Venue	Date	Time	Speaker
Oxford	3 Feb	15:30-18:30	Andrew Burgess

£90 plus VAT per person

Season Ticket Option Available

Tax Planning for Owner Managers

The advent of the 50% tax rate and 28% CGT rate, as well as further tax and NI rises next year, mean that tax efficient planning has become more important than ever for owner managers.

CONTENT

This course will consider the changes and current options that are available for owner managers. In particular, it will consider:

- Incorporation - the current scenario and particular issues
- Extraction of profits from companies
- Utilising the family's tax bands and allowances
- Loans and equity finance provided to a company
- Loans from the company to participators
- Multi-business activities by family members
- Entrepreneurs' Relief opportunities
- Own share purchases
- Likely areas of HMRC attack
- Investment opportunities

This course will not consider schemes.

CPD HOURS: 3

Venue	Date	Time	Speaker
Bury St Edmunds	3 Mar	15:00-18:00	Mark Morton

£90 plus VAT per person

Season Ticket Option Available

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. FRS 8 contains detailed requirements regarding what must be disclosed in the accounts for related parties and confirms that directors will always be a related party. These are supplemented by the legal requirements in Company law.

The requirements of Schedule 6 of the 1985 Companies Act cease to apply for periods commencing 6 April 2008 onwards and are replaced by the less detailed regulation of the Companies Act 2006. Although less detailed the new requirements are causing problems and the interaction with FRS 8 / FRSSE is difficult to apply in practice.

On top of this HM Revenue & Customs 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 objective will be to take a number of transactions involving directors and consider in detail the legal and tax consequences and the disclosure requirements.

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 disclosures of transactions

Warning!
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
Bristol	10 Nov	09:30-12:30	John Welsford
	10 Nov	13:45-16:45	John Welsford

£90 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
High Wycombe	5 May	09:30-12:45	Martyn Ingles
	14 Jul	14:00-17:15	Mark Morton
	1 Nov	09:30-12:45	Dean Wootten
	1 Nov	14:00-17:15	Dean Wootten

£90 plus VAT per person

Season Ticket Option Available

Topical Tax Issues

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	15 Nov	13:30-16:30	Norman Allison
Belfast *	30 Nov	09:30-12:30	Dean Wootten
Billericay	17 Nov	14:00-17:15	Phil Williams
Birmingham	1 Dec	09:15-12:15	Mark Morton
	1 Dec	14:30-17:30	Mark Morton
Bracknell	6 Apr	14:00-17:15	Phil Williams
Bristol	7 Feb	13:45-16:45	Norman Allison
Bury St Edmunds	28 Nov	15:00-18:00	Norman Allison
Cambridge	17 Nov	15:00-18:00	Mark Morton
Darlington	9 Feb	14:00-17:00	Phil Williams
Derby	22 Nov	14:30-17:30	Mark Morton
Edinburgh	17 Nov	13:30-16:30	Norman Allison
Exeter	8 Feb	14:00-17:00	Norman Allison
Glasgow	14 Nov	13:30-16:30	Norman Allison
Gravesend	6 Dec	14:00-17:15	Phil Williams
Hatfield	8 Dec	14:00-17:15	Phil Williams
High Wycombe	13 Dec	14:00-17:15	Phil Williams
Ipswich	16 Nov	09:30-12:45	Phil Williams
	16 Nov	14:00-17:15	Phil Williams
Lancaster	1 Dec	14:00-17:00	Norman Allison
Leeds	9 Nov	14:00-17:15	Phil Williams
Leicester	15 Nov	09:15-12:15	Mark Morton
	29 Nov	09:15-12:15	Mark Morton
	29 Nov	14:00-17:00	Mark Morton
London	23 Nov	09:30-12:45	Phil Williams
	23 Nov	14:00-17:15	Phil Williams
Londonderry *	29 Nov	09:30-12:30	Dean Wootten
Manchester	30 Nov	14:00-17:15	Phil Williams
Middlesbrough	17 Feb	09:30-12:30	Phil Williams
Milton Keynes	29 Nov	14:00-17:15	Phil Williams
Newbury	7 Dec	14:00-17:15	Phil Williams
Newcastle	10 Nov	15:30-18:30	Phil Williams
Northampton	15 Nov	14:30-17:30	Mark Morton
	30 Nov	09:15-12:15	Mark Morton
Norwich	15 Nov	13:30-16:45	Phil Williams
Nottingham	14 Nov	14:00-17:00	Mark Morton
	23 Nov	09:15-12:15	Mark Morton
Oxford	22 Nov	15:30-18:30	Norman Allison
	5 Dec	15:30-18:30	Norman Allison
Peterborough	21 Nov	15:00-18:00	Mark Morton
Sheffield	8 Feb	14:00-17:00	Phil Williams
	16 Feb	16:00-19:00	Phil Williams
Solihull	15 Feb	15:30-18:30	Norman Allison
	24 Feb	15:30-18:30	Norman Allison
Southend	8 Nov	14:00-17:15	Phil Williams
Stirling	16 Nov	13:30-16:30	Norman Allison
Tunbridge Wells	28 Nov	14:00-17:15	Phil Williams
Walsall	10 Feb	14:00-17:00	Phil Williams
	15 Feb	14:00-17:00	Phil Williams
Watford	21 Nov	14:00-17:15	Phil Williams
West Bromwich	16 Nov	09:15-12:15	Mark Morton
	16 Nov	14:30-17:30	Mark Morton
York	14 Nov	14:00-17:15	Phil Williams

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

The Tax Man Cometh - Handling Revenue Enquiries

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
Aberdeen	18 May	13:30-16:30	Mark Morton
Bristol	6 Dec	13:45-16:45	Mark Morton
Bury St Edmunds	2 Nov	15:00-18:00	Andrew Burgess
Darlington	24 May	09:30-12:30	Mark Morton
Edinburgh	19 May	13:30-16:30	Mark Morton
Exeter	14 Apr	14:00-17:00	Mark Morton
Glasgow	11 May	13:30-16:30	Mark Morton
Lancaster	10 Feb	14:00-17:00	Mark Morton
Middlesbrough	9 May	14:00-17:00	Mark Morton

£90 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
Middlesbrough	21 Mar	14:00-17:00	Andrew Burgess

£90 plus VAT per person

Season Ticket Option Available

VAT: Cross Border Trading

OBJECTIVES

The VAT rules in relation to international services are very different from those that apply to trading in goods. It is recognised that the VAT rules for supplying services to overseas customers or receiving services from overseas suppliers are probably the most complex in the VAT system.

Important changes to the place of supply rules were introduced on 1 January 2010 and 1 January 2011, producing a different VAT treatment for many services and a new tax return that many businesses need to complete each quarter. The course will consider the impact of these changes, as well as refresh delegates on the rules concerning trading in goods across the borders.

CONTENT

- The importance of establishing the place of supply of a service as far as VAT is concerned
- Services where the place of supply depends on the location of the customer
- The importance of establishing the status and location of the customer
- Dealing with services involving land e.g. building work, architect fees
- Services where the VAT charge is based on where work is actually performed
- Situations when a UK business may need to register for VAT in another EU country
- Circumstances when an overseas supplier may need to or want to register for VAT in the UK
- Dealing with accounting entries – the reverse charge calculation, EU Sales Lists and VAT returns
- Input tax issues – claiming input tax on expenses where place of supply is outside the UK
- Reclaiming overseas VAT (EU and non-EU countries) – 8th and 13th Directive claims – pitfalls and procedures

CPD HOURS: 3 (Audit related: 1)

Venue	Date	Time	Speaker
Coventry	9 Feb	15:30-18:30	Neil Warren
	24 Feb	15:30-18:30	Neil Warren

£90 plus VAT per person

Season Ticket Option Available

VAT: Imports, Exports and International Services

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.

CONTENT

- The extent of the EC
- Imports and exports
- Acquisitions and EC sales
- Place of supply of services
- The 2010 and 2011 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

CPD HOURS: 3 (Audit related: 1)

Venue	Date	Time	Speaker
London	10 Feb	14:00-17:00	Neil Owen
Nottingham	1 Mar	14:00-17:00	Neil Owen

£120 plus VAT per person

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.

At the end of this course participants should have:

- a clear understanding of the way the rules work and why
- greater confidence to advise clients undertaking property transactions
- an appreciation of the pitfalls in this area and how to avoid them.

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 (Audit related: 1)

Venue	Date	Time	Speaker
Coventry	21 Mar	14:00-17:00	Neil Owen
London	14 Mar	14:00-17:00	Neil Owen

£120 plus VAT per person

VAT Update including Cross Border Trading

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 some of the changes in the last 12 months, explain the likely impact of those changes on businesses, and consider a number of issues relating to cross-border trading from a VAT perspective.

CONTENT

This course will cover:

- Changes in VAT legislation
- Changes in HMRC practice
- VAT cases and tribunal decisions and their practical implications
- A review of developing VAT issues and their likely impact on businesses.
- A particular focus on international transactions

CPD HOURS: 3 (Audit related: 1)

Venue	Date	Time	Speaker
Bury St Edmunds	30 Mar	15:00-18:00	Neil Owen
Colchester	23 May	15:30-18:30	Neil Warren
Darlington	23 Mar	09:30-12:30	Neil Warren
Lancaster	20 Oct	14:00-17:00	Neil Warren
Middlesbrough	10 Mar	14:00-17:00	Neil Warren
Oxford	22 Feb	15:30-18:30	Neil Owen
	23 Mar	15:30-18:30	Neil Owen

£90 plus VAT per person

Season Ticket Option Available

VAT Update and Problem Areas

available online

OBJECTIVES

The objective of the course is to review problem areas that practitioners may come across on a regular basis and at the same time highlight key changes in VAT legislation and case law that may affect them in these areas.

CONTENT

- VAT on international issues – where are we now?
- 2011 Budget issues
- Impact of relevant VAT cases in the last 12 months
- Common problem areas for SMEs – input tax recovery, adjusting VAT errors
- VAT compliance – update on new penalty regime and tips on dealing with HMRC
- Partial exemption - recent changes and planning tips
- Getting the VAT liability right
- Land and buildings - option to tax procedures
- VAT schemes – pitfalls and opportunities
- 20% rate of VAT – review of problem areas

CPD HOURS: 3 (Audit related: 1)

Venue	Date	Time	Speaker
Aberdeen	23 Jun	13:30-16:30	Simone Hurst
Belfast *	30 Nov	13:45-16:45	Dean Wootten
Billericay	6 Dec	14:00-17:15	Neil Warren
Birmingham	26 Oct	09:15-12:15	Simone Hurst
	26 Oct	14:30-17:30	Simone Hurst
Bracknell	21 Nov	09:30-12:45	Neil Warren
Bristol	9 Jun	13:45-16:45	Simone Hurst
Cambridge	10 Oct	15:00-18:00	Simone Hurst
Derby	19 Oct	14:30-17:30	Simone Hurst
Edinburgh	20 Jun	13:30-16:30	Simone Hurst
Glasgow	21 Jun	13:30-16:30	Simone Hurst
Gravesend	15 Nov	14:00-17:15	Neil Warren
Hatfield	16 Nov	14:00-17:15	Neil Warren
High Wycombe	29 Nov	14:00-17:15	Neil Warren
Ipswich	30 Nov	09:30-12:45	Neil Warren
	30 Nov	14:00-17:15	Neil Warren
Leeds	12 Dec	14:00-17:15	Simone Hurst
Leicester	18 Oct	09:15-12:15	Simone Hurst
	27 Oct	14:00-17:00	Simone Hurst
London	5 Dec	09:30-12:45	Neil Warren
	5 Dec	14:00-17:15	Neil Warren
Londonderry *	29 Nov	13:45-16:45	Dean Wootten
Manchester	13 Dec	14:00-17:15	Simone Hurst
Milton Keynes	8 Nov	14:00-17:15	Neil Warren
Newbury	8 Jun	14:00-17:15	Neil Warren
Newcastle	8 Dec	15:30-18:30	Simone Hurst
Northampton	11 Oct	09:15-12:15	Simone Hurst
	20 Oct	14:30-17:30	Simone Hurst
Norwich	1 Dec	13:30-16:45	Neil Warren
Nottingham	13 Oct	14:00-17:00	Simone Hurst
	25 Oct	09:15-12:15	Simone Hurst
Peterborough	31 Oct	15:00-18:00	Simone Hurst
Solihull	9 Jun	15:30-18:30	Neil Warren
	21 Jun	15:30-18:30	Neil Warren
Southend	23 Nov	14:00-17:15	Neil Warren
Stirling	22 Jun	13:30-16:30	Simone Hurst
Tunbridge Wells	14 Nov	14:00-17:15	Neil Warren
Walsall	7 Jun	14:00-17:00	Neil Warren
	22 Jun	14:00-17:00	Neil Warren
Watford	8 Dec	14:00-17:15	Neil Warren
West Bromwich	6 Oct	09:15-12:15	Simone Hurst
	6 Oct	14:30-17:30	Simone Hurst
York	7 Dec	14:00-17:15	Simone Hurst

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Delivering Service Excellence and Developing Client Advocacy

OBJECTIVES

Delegates will have the opportunity to review the key skills and disciplines required in managing client relationships and expectations effectively and ensure they deliver a consistent, excellent service to their clients, with the ultimate objective of turning their clients into advocates of them and their firm.

CONTENT

- Identifying and clarifying clients needs and expectations
- Delivering to client needs and keeping promises
- Delivering added value
- Providing clarity and transparency around actions and outputs
- Handling complaints, perceptions of non delivery and areas of difficulty
- Seeking and responding to client feedback
- Turning clients into advocates

CPD HOURS: 3

Venue	Date	Time	Speaker
Billericay	20 Sep	14:00-17:15	John Sharkey
Birmingham	8 Jun	14:30-17:30	John Sharkey
Cambridge	25 May	15:00-18:00	John Sharkey
Darlington	21 Jun	14:00-17:00	John Sharkey
Derby	24 May	14:30-17:30	John Sharkey
High Wycombe	12 Oct	14:00-17:15	John Sharkey
Leicester	17 May	09:15-12:15	John Sharkey
London	6 Sep	14:00-17:15	John Sharkey
Northampton	11 May	09:15-12:15	John Sharkey
Nottingham	7 Jun	14:00-17:00	John Sharkey
Sudbury	15 Jun	15:00-18:00	John Sharkey
West Bromwich	18 May	14:30-17:30	John Sharkey
York	1 Nov	14:00-17:15	John Sharkey

£90 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 distractions and interruptions

CPD HOURS: 3

Venue	Date	Time	Speaker
Belfast *	10 May	09:30-12:30	John Sharkey
Londonderry *	9 May	13:45-16:45	John Sharkey
Oxford	9 Nov	15:30-18:30	John Sharkey

* Alternative prices apply at these venues

£90 plus VAT per person

Season Ticket Option Available

Sage 50 Payroll Report Designer

OBJECTIVES

This course is designed for staff already familiar with the Payroll Report Designer in Payroll v.2010 (or below) who need to update their skills for the new Sage Payroll Report Designer in Sage 50 Payroll v.2011 (and above).

This hands-on half day course is designed for the more experienced Sage Payroll user who is likely to want to use the Payroll Report Designer to either modify any of the existing Sage Payroll reports and layouts, or create new Payroll reports and layouts from scratch, using the latest version.

The new Sage 50 Payroll v.2011 Report Design module will be used.

CONTENT

- New file extensions
- Using the navigation panes and menus
- Sorts – adding sorts to reports and layouts
- Filters – adding filters to reports and layouts
- Conditional (filter) formatting
- New Report Design Wizard
- Converting reports from previous versions
- Expressions – adding expressions to reports and layouts
- Report Design Projects

CPD HOURS: 3

NUMBERS LIMITED TO 12

Venue	Date	Time	Speaker
Birmingham	21 Mar	14:00-17:00	Mike Rees
London	16 Mar	14:00-17:00	Mike Rees
Nottingham	17 Mar	14:00-17:00	Mike Rees

£120 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 and new Recovery wizard
- Manually reconciling year-end reports
- Sage 50 Payroll year-end and post year-end update procedures
- Import wizard and Advanced Data Import
- Exporting Payroll data and exporting Nominal journals
- Data Merge utility
- Compliance report

Please note that anyone requiring technical knowledge of PAYE and NI are advised to attend our Payroll Update courses.

CPD HOURS: 3

NUMBERS LIMITED TO 12

Venue	Date	Time	Speaker
Birmingham	21 Mar	09:30-12:30	Mike Rees
London	16 Mar	09:30-12:30	Mike Rees
Nottingham	17 Mar	09:30-12:30	Mike Rees
Stirling *	2 Feb	13:30-16:30	??????

* Alternative prices apply at these venues

£120 plus VAT per person

Webinars

- live and interactive one hour CPD

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An effective training solution that combines technological innovations with Mercia's wealth of experience.

- Our live 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
- The webinars feature experienced presenters and delegates can interact with them by asking text based questions. A recording is available to watch again for one month.
- Course notes are downloadable from the live online seminar site
- Full IT technical support is available from experienced technicians

Recorded webinars

If you can't make the date or time of a live webinar we also provide recorded versions of our webinars. These are available to purchase and view for up to three months after the date of the live event.

Cost

Each webinar costs £75 plus VAT per participant or £225 plus VAT for three or more participants (25% discount for training members - excluding CPD members).

Our Spring 2011 programme includes the following topics:

Audit and Accounts
Mercia Audit Manual - Materiality and Misstatements
Tax Credits
Money Laundering: Key Issues
IFRS: Current Issues
Related Parties: Audit and Accounts
Mercia Audit Manual - Related Parties
Solicitors' Accounts Rules - The Key Changes
Ethical Standards
Dealing with Properties - Accounting Issues

Tax
Dealing with Properties - Tax Issues for Property Developers
CGT Deferral Reliefs - The Essentials
Budget 2011
Expenses and Benefits - The Essentials
VAT: International Issues
Basic Principles of Trusts
VAT: Charities
The Key Tax Aspects of Partnerships
HMRC Toolkits - Corporation Tax Issue

Our programme of webinars is constantly being updated so for the latest list please visit our website at **www.mercia-group.co.uk/webinars**

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.

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	17 Feb	14:00-17:00	John Sharkey

Venue details provided with booking confirmation

£185 plus VAT per person

Dealing with Difficult People

OBJECTIVES

To enable participants to:

- Enhance their confidence and capabilities at dealing with difficult people and difficult situations
- Overcome the day-to-day barriers to communication at work
- Use effective communication to build relationships with colleagues and clients

CONTENT

- Learn strategies for dealing with a variety of difficult people and situations
- Understand what can initiate difficult behaviour
- Identify different personality types and how to deal with them
- Handling emotion
- Identifying and overcoming the barriers to effective communication
- Remaining assertive when handling difficult people and situations
- Developing and building relationships with clients and colleagues

CPD HOURS: 6

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	28 Jun	09:30-17:00	John Sharkey

Venue details provided with booking confirmation

£295 plus VAT per person

Delivering Service Excellence and Developing Client Advocacy

OBJECTIVES

To enable participants to:

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

CONTENT

- What is service?
- Identifying clients' needs and expectations
- Managing client expectations
- Using service standards to manage the service process
- Developing and building relationships
- Monitoring clients' perceptions
- Handling areas of difficulty and complaint
- Making the most of client meetings
- Turning clients into advocates

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	17 Feb	09:30-12:30	John Sharkey

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	18 Oct	09:30-17:00	Andrew Whittaker

Venue details provided with booking confirmation

£295 plus VAT per person

Developing Your Personal Image and Reputation

OBJECTIVES

To enable participants to:

- Understand the nature of influencing and how they influence others around them
- Develop their personal 'gravitas' and presence through use of positive behaviour, use of voice and body language
- Apply these skills and behaviours effectively in a variety of important business and personal situations to ensure maintenance of their reputation

CONTENT

Influencing principles

- What is influence and presence?
- Character analysis
- The three influencing dimensions

Building personal presence and your reputation

- How others see you - positive thinking, behaviour and language
- Personal values
- Developing voice projection

Dealing with day to day situations - building your reputation

- Conscious dressing
- Jargon, accents, humour and jokes
- Building rapport easily - getting other people to 'like' you
- Meeting people for the first time
- Client entertaining and social events
- Dealing with client complaints so that they remain a client

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	15 Mar	09:30-12:30	Andrew Whittaker

Venue details provided with booking confirmation

£185 plus VAT per person

Effective Business Writing Skills

OBJECTIVES

To enable participants to:

- Identify and overcome the barriers to written communication at work
- Appreciate the critical importance of clarifying purpose and the needs and interests of the readership
- Use a writing style that is concise but complete as well as being accurate and persuasive
- Apply a disciplined and staged approach to report writing so that the final product is logical, accurate and effective
- Recognise the value of being able to write good e-mails, letters and reports

CONTENT

- Common failings in business writing and how to overcome them
- Getting the fundamentals right: purpose and readership
- Getting your message across effectively: developing your writing style
- How to set the right tone in your writing
- Selecting and structuring material
- Planning, writing and presenting reports
- E-mail etiquette
- Reviewing and editing
- Personal action plans

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	23 Nov	09:30-12:30	Sally Hutchings

Venue details provided with booking confirmation

£185 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	15 Mar	14:00-17:00	Andrew Whittaker

Venue details provided with booking confirmation

£185 plus VAT per person

Effective Presentation Skills

OBJECTIVES

To enable participants to:

- Understand the key skills involved in delivering effective business presentations
- To enhance their confidence in applying those skills when delivering such presentations

CONTENT

- The importance of preparation - getting it right before you start! Knowing your audience, knowing your message and knowing your limits
- Outlining, structuring and composing your presentation - including the importance of strong introductions and conclusions, getting the words right and the use of visual aids
- Using PowerPoint to support the presentation rather than it being a distraction - tips of the trade
- Delivering your presentation - controlling nerves, pace and tone of delivery, the importance of non verbal communication and handling the audience
- Handling questions effectively
- Practice presentations

CPD HOURS: 6

NUMBERS LIMITED TO 8

Venue	Date	Time	Speaker
Midlands	5 Jul	09:30-17:00	John Sharkey

Venue details provided with booking confirmation

£295 plus VAT per person

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 effective 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 distractions and interruptions

CPD HOURS: 3

NUMBERS LIMITED TO 18

Venue	Date	Time	Speaker
Midlands	23 Nov	14:00-17:00	Sally Hutchings

Venue details provided with booking confirmation

£185 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	28 Mar	09:30-17:00	Sally Hutchings
London	6 Apr	09:30-17:00	John Sharkey

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
London	14 Sep	09:30-17:00	John Sharkey
Midlands	15 Sep	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	12 May	09:30-17:00	Jim Thomas

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 Kay Sanders, Emily Bailey or Andrew Paul on 0116 258 1200.

Effective Business Plans

WHO SHOULD ATTEND

The course is intended for staff who are involved in or about to become involved in writing business plans in the current economic climate The relevance of the course will depend upon participants level of responsibility and practical experience. It is likely to be relevant to staff with at least three years experience in the profession, who have had limited exposure in either preparing or reviewing business plans. Staff who have regularly been involved in preparing business plans are unlikely to derive significant benefit from the course.

OBJECTIVES

The course aims to review the issues which should be considered in the planning process, together with the contents required in a business plan. The course will also consider relevant review procedures either for self review or an assurance engagement.

CONTENT

- Gathering information and interviewing the client
- Preparing the forecast
- Use of analysis tools
- Preparing the business plan
- Reviewing the forecast and performing sensitivity analysis
- Reviewing the business plan
- The reasons for commercial success and failure

CPD HOURS: 3

Venue	Date	Time
Birmingham	6 Apr & 13 May	09:30-13:00
Bristol	3 Mar	10:00-13:00
High Wycombe	9 Feb	14:00-17:15
Leicester	11 Mar	09:30-13:00
Nottingham	24 Mar	09:30-13:00
Oxford	29 Mar	09:30-13:00
Peterborough	7 Apr	09:30-13:00

Venue details provided with booking confirmation

£50 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
Belfast	11 May	09:30-17:00

Venue details provided with booking confirmation

£120 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. Staff new to the interviewing process usually with 6 to 24 months experience in the profession should attend.

The focus of the course is finalisation of partnership accounts and does not cover company accounts disclosure.

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.

Participants are given a draft set of accounts, full of errors, for a fictitious client, Leisure Products. Using ratios and analytical review, groups of 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
Belfast *	22 Mar	09:30-17:00
Birmingham	22 Feb & 12 Oct	09:30-17:00
Cambridge	9 Nov	09:30-17:00
High Wycombe	18 Mar	09:30-17:15
Leicester	8 Mar & 9 Nov	09:30-17:00
Nottingham	10 May & 25 Oct	09:30-17:00
Oxford	3 Mar	09:30-17:00
Peterborough	15 Jul	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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.

OBJECTIVES

At the end of the day participants will have prepared a set of accounts, together with supporting working papers. This will be undertaken by using both manual books and records and also computerised accounting records.

CONTENT

- There will be little formal lecturing on this course. Participants will be presented with a set of records which are partially complete including extracts of day books, invoices, cheque book stubs etc. They are then required to participate in the creation of a work plan and follow this through in order to prepare the accounts.
- The course will incorporate some use of spreadsheets for analysing the cashbook transactions and preparing lead schedules.
- Participants will review the draft accounts to identify unusual items.
- Following discussions with the client, all adjustments will be posted by the completion of an extended trial balance on a spreadsheet.
- The case study will then be revisited, now with the client using computerised records to demonstrate a different way of recording transactions and the main problem areas which may be encountered. Analysis and reconciliations will be performed as necessary.

CPD HOURS: 6

Venue	Date	Time
Birmingham	21 Feb & 7 Nov	09:30-17:00
Bristol	23 Feb	10:00-17:00
Cambridge	8 Nov	09:30-17:00
Colchester	30 Nov	09:30-16:30
Exeter	22 Nov	09:30-16:30
High Wycombe	24 Nov	09:30-17:15
Lancaster	1 Nov	09:30-17:00
Leeds	14 Feb	09:30-17:00
Leicester	24 Feb & 11 Nov	09:30-17:00
London	28 Feb & 16 Nov	09:30-16:30
Manchester	7 Feb	09:30-17:00
Middlesbrough	7 Mar	09:30-17:00
Newcastle	31 Jan	09:30-17:00
Northampton	23 Nov	09:30-17:00
Nottingham	13 Jan	09:30-17:00
Nottingham	14 Nov	09:30-17:00
Oxford	16 Feb	09:30-17:00
Sheffield	17 Jan	09:30-17:00

Venue details provided with booking confirmation

£100 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 *	23 Nov	09:30-13:00
Birmingham	18 Jan & 14 Jun	09:30-13:00
Bristol	14 Feb	10:00-13:00
Colchester	12 Apr	09:30-13:00
Exeter	6 Dec	09:30-13:00
High Wycombe	15 Mar	09:30-13:00
Lancaster	2 Nov	09:30-13:00
Leeds	15 Feb	09:30-13:00
Leicester	11 Jan	09:30-13:00
London	18 Jan & 31 May	09:30-13:00
Manchester	8 Feb	09:30-13:00
Middlesbrough	8 Mar	09:30-13:00
Newcastle	1 Feb	09:30-13:00
Nottingham	7 Jun	09:30-13:00
Oxford	21 Feb	09:30-13:00
Peterborough	2 Mar	09:30-13:00
Sheffield	18 Jan	09:30-13:00
Stirling *	10 Mar	09:30-16:30

* Alternative prices apply at these venues

£50 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 the audit of bank and cash 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

'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 *	23 Nov - 25 Nov	09:30-17:00
Birmingham	14 Jun - 16 Jun 18 Jan - 20 Jan	09:30-17:00 09:30-17:00
Colchester	12 Apr - 14 Apr	09:30-16:30
Exeter	7 Dec - 8 Dec	09:30-16:30
High Wycombe	15 Mar - 17 Mar	09:30-17:15
Lancaster	2 Nov - 4 Nov	09:30-17:00
Leeds	15 Feb - 17 Feb	09:30-17:00
Leicester	11 Jan - 13 Jan	09:30-17:00
London	18 Jan - 20 Jan 31 May - 2 Jun	09:30-16:30 09:30-16:30

Venue	Date	Time
Manchester	8 Feb - 10 Feb	09:30-17:00
Middlesbrough	8 Mar - 10 Mar	09:30-17:00
Newcastle	1 Feb - 3 Feb	09:30-17:00
Nottingham	7 Jun - 9 Jun	09:30-17:00
Oxford	21 Feb - 23 Feb	09:30-17:00
Peterborough	2 Mar - 4 Mar	09:30-17:00
Sheffield	18 Jan - 20 Jan	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

£250 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 2006. This often also includes the preparation of abbreviated accounts. Whilst carrying out the preparation of accounts, the company may require other services from the accountant including some level of assurance on their financial statements. Whilst the purpose of this course is not to examine such services in detail, the principles involved are introduced. 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.

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
- introduction to accounts' assurance assignments

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

CPD HOURS: 3

Venue	Date	Time
Belfast *	18 Oct	14:00-17:00
Birmingham	28 Jun & 5 Oct	14:00-17:00
Cambridge	21 Oct	14:00-17:00
Colchester	25 Oct	13:30-16:30
High Wycombe	8 Mar	14:00-17:15
Lancaster	11 Mar	14:00-17:00
Leeds	12 Oct	14:00-17:00
Leicester	18 May	14:00-17:00
London	18 Oct & 9 Dec	13:30-16:30
Manchester	14 Oct	14:00-17:00
Middlesbrough	5 Apr	14:00-17:00
Newcastle	1 Nov	14:00-17:00
Northampton	10 Nov	14:00-17:00
Nottingham	19 Oct	14:00-17:00
Peterborough	5 Jul	14:00-17:00
Stirling *	11 Mar	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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!

Students who have already attended an introductory bookkeeping course provided as part of their examination studies may not benefit from attending this course, but should instead attend 'Bookkeeping: The Next Stage' and 'Bookkeeping Case Study'.

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 *	19 Sep	09:30-17:00
Birmingham	7 Feb & 12 Sep & 26 Sep	09:30-17:00
Bristol	5 Sep	10:00-17:00
Colchester	26 Sep	09:30-16:30
Lancaster	19 Sep	09:30-17:00
Leeds	19 Sep	09:30-17:00
Leicester	7 Feb & 5 Sep	09:30-17:00
London	7 Feb & 5 Sep & 19 Sep	09:30-16:30
Manchester	12 Sep	09:30-17:00
Newcastle	12 Sep	09:30-17:00
Nottingham	12 Sep	09:30-17:00
Oxford	19 Sep	09:30-17:00
Peterborough	19 Sep	09:30-17:00
Stirling *	22 Aug	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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 *	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	8 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	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

£100 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	Venue	Date	Time
Belfast*	21 Sep - 22 Sep	09:30-17:00	London	21 Sep - 22 Sep	09:30-16:30
Birmingham	14 Sep - 15 Sep	09:30-17:00		7 Sep - 8 Sep	09:30-16:30
	28 Sep - 29 Sep	09:30-17:00		9 Feb - 10 Feb	09:30-16:30
	9 Feb - 10 Feb	09:30-17:00	Manchester	14 Sep - 15 Sep	09:30-17:00
Colchester	28 Sep - 29 Sep	09:30-16:30	Newcastle	14 Sep - 15 Sep	09:30-17:00
Lancaster	21 Sep - 22 Sep	09:30-17:00	Nottingham	14 Sep - 15 Sep	09:30-17:00
Leeds	21 Sep - 22 Sep	09:30-17:00	Oxford	21 Sep - 22 Sep	09:30-17:00
Leicester	7 Sep - 8 Sep	09:30-17:00	Peterborough	21 Sep - 22 Sep	09:30-17:00
	9 Feb - 10 Feb	09:30-17:00	Stirling*	24 Aug - 25 Aug	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£200 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.

It is not suitable for anyone with extensive experience of such assignments who 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 are and understand how to act for charities in practice. The course will fully reflect the latest rules, whilst highlighting any key differences arising from recent changes.

CONTENT

- Overview of charity legislation for unincorporated and incorporated charities
- The accounting and reporting 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 and the Auditor
- Small charities
- Trustees and the trustees' report

The course will be a combination of lecturing, case studies, discussions and questions designed to ensure as much information is retained as possible.

CPD HOURS: 3

Venue	Date	Time
Bristol	16 Mar	10:00-13:00
Colchester	9 Feb	09:30-13:00
High Wycombe	16 May	09:30-13:00
Leeds	15 Nov	09:30-13:00
London	4 May	09:30-13:00
London	28 Sep	09:30-13:00
Manchester	9 Nov	09:30-13:00
Newcastle	16 Nov	09:30-13:00

Venue details provided with booking confirmation

£50 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
Birmingham	14 Mar & 3 Oct	09:30-13:00
Exeter	10 Mar	09:30-13:00
High Wycombe	5 Jul	09:30-13:00
Leeds	27 Jan	09:30-13:00
Leicester	7 Mar & 31 Oct	09:30-13:00
Newcastle	26 Jan	14:00-17:00
Northampton	9 Mar	09:30-13:00
Nottingham	16 Feb & 17 Oct	09:30-13:00
Peterborough	8 Apr	09:30-13:00
Stirling *	8 Apr	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 plus VAT per person

Clarified ISAs: Practical Application

WHO SHOULD ATTEND

Seniors and semi seniors involved in the audit of limited companies. A knowledge of basic audit procedures is assumed.

OBJECTIVES

On completion of the course, participants will:

- be aware of the practical impact of the adoption of clarified ISA+s in the UK
- understand the overall effects of the changes
- understand much of the detailed impact of the changes on audit procedures and documentation.

They will have a practical understanding of how these changes will impact on the performance of an audit and on the level and detail of documentation required at the planning, fieldwork and completion stages.

CONTENT

The course will consist of a mixture of case studies, discussion exercises and lecturing. The main focus will be on the audit areas where the introduction of Clarified ISAs will have greatest practical impact, including:

- Related parties – what to record on the permanent file and which tests to perform
- Estimates – identifying what the client has included, which ones matter and how to audit them
- Groups – all the significant changes, what steps to take and what to record
- Communication with clients – new requirements for management letters and representation letters
- Materiality – what is performance materiality and how will you use it
- Control deficiencies – what needs to be reviewed, recorded and communicated
- Evaluation of misstatements – are the current unadjusted errors schedules in need of change?

Throughout the course examples will be drawn from PN26 (the latest guidance on owner managed business audit documentation).

CPD HOURS: 3

Venue	Date	Time
Bristol	24 Feb	13:30-17:00
Exeter	11 Mar	09:30-13:00
Stirling *	8 Apr	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 plus VAT per person

Company Accounting Problems

WHO SHOULD ATTEND

Meeting the accounting and disclosure requirements for limited company accounts can be particularly difficult in two situations. This is 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 18 and 36 months.

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
- Revaluations
- Prior Year Adjustments
- Revenue Recognition

CPD HOURS: 6

Venue	Date	Time
Colchester	17 Mar	09:30-16:30
High Wycombe	12 Jul	09:30-17:15
Leeds	9 May	09:30-17:00
London	6 May & 21 Jun	09:30-16:30
Manchester	15 Mar	09:30-17:00
Newcastle	26 May	09:30-17:00

Venue details provided with booking confirmation

£100 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 if they have been away from audits for some time.

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
Belfast *	23 Mar	09:30-13:00
Colchester	15 Nov	09:30-13:00
High Wycombe	17 May	09:30-13:00
Leeds	23 Mar	09:30-13:00
London	5 May & 20 Jun	09:30-13:00
Manchester	14 Mar	09:30-13:00
Newcastle	24 Mar	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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
Bristol	21 Nov	13:30-17:00
Colchester	16 Nov	13:30-16:30
High Wycombe	13 Jul	14:00-17:15
Leeds	14 Nov	14:00-17:00
London	6 Oct & 21 Nov	13:30-16:30
Manchester	11 Nov	14:00-17:00
Newcastle	25 Mar	14:00-17:00
Oxford	4 Oct	09:30-13:00
Sheffield	14 Feb	14:00-17:00

Venue details provided with booking confirmation

£50 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 and audit exempt 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 *	23 Mar	14:00-17:00
Bristol	24 Feb	10:00-13:00
Colchester	15 Nov	13:30-16:30
High Wycombe	17 May	14:00-17:15
Lancaster	9 May	09:30-13:00
Leeds	23 Mar	14:00-17:00
London	5 May & 20 Jun	13:30-16:30
Manchester	14 Mar	14:00-17:00
Newcastle	24 Mar	14:00-17:00
Stirling *	9 Dec	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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 requirements 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. The standards were subsequently revised in 2008.

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

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

CPD HOURS: 3

Venue	Date	Time
Oxford	4 Apr	14:00-17:00

Venue details provided with booking confirmation

£50 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
Birmingham	1 Mar & 13 Oct	14:00-17:00
Cambridge	10 Nov	14:00-17:00
Exeter	11 Mar	13:30-16:30
Leicester	9 Mar & 10 Nov	14:00-17:00
Nottingham	11 May & 26 Oct	14:00-17:00
Oxford	3 Oct	14:00-17:00
Peterborough	14 Jul	14:00-17:00

Venue details provided with booking confirmation

£50 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.

Participants who have previously attended a money laundering training session, even if this was with a previous employer, will derive little benefit from this course.

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
Birmingham	14 Mar & 3 Oct	14:00-17:00
Bristol	16 Mar	13:30-17:00
Colchester	9 Feb	13:30-16:30
Exeter	10 Mar	13:30-16:30
High Wycombe	16 May 11 Oct	14:00-17:15 09:30-13:00
Leeds	15 Nov	14:00-17:00
Leicester	7 Mar & 31 Oct	14:00-17:00
London	4 May & 28 Sep	13:30-16:30
Manchester	9 Nov	14:00-17:00
Newcastle	16 Nov	14:00-17:00
Northampton	9 Mar	14:00-17:00
Nottingham	16 Feb & 17 Oct	14:00-17:00
Peterborough	8 Apr	14:00-17:00
Stirling *	2 Nov	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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
Birmingham	1 Mar & 13 Oct	09:30-13:00
Cambridge	10 Nov	09:30-13:00
Leicester	9 Mar & 10 Nov	09:30-13:00
Nottingham	11 May & 26 Oct	09:30-13:00
Oxford	3 Oct	09:30-13:00
Peterborough	14 Jul	09:30-13:00

Venue details provided with booking confirmation

£50 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 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
Bristol	21 Nov	10:00-13:00
Colchester	16 Nov	09:30-13:00
High Wycombe	13 Jul	09:30-13:00
Lancaster	16 Mar	14:00-17:00
Leeds	14 Nov	09:30-13:00
London	6 Oct & 21 Nov	09:30-13:00
Manchester	11 Nov	09:30-13:00
Middlesbrough	18 Apr	14:00-17:00
Newcastle	25 Mar	09:30-13:00
Oxford	4 Oct	14:00-17:00
Sheffield	14 Feb	09:30-13:00
Stirling *	9 Dec	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 plus VAT per person

Solicitors' Accounts Rules - A Practical Refresher

WHO SHOULD ATTEND

The course is aimed at those who undertake the work on Solicitors' records. It is suitable for people who are involved in the fieldwork on these assignments and is designed to act as a refresher/update on the Solicitors' Accounts Rules. It will be a combination of formal lecturing and case studies/quizzes to illustrate the key points.

It is not suitable for people with no prior experience of SAR as a basic understanding of Solicitors' Accounts Rules is required. People seeking an introduction to the Rules are advised to attend An Introduction to Solicitors' Accounts Rules.

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

Venue	Date	Time
Bristol	14 Feb	13:30-17:00
Middlesbrough	18 Apr	09:30-13:00
Sheffield	15 Feb	09:30-13:00

Venue details provided with booking confirmation

£50 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 in 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:

- FRSME and the future for UK financial reporting
- Clarified ISA+s
- FRS 30 – Heritage Assets
- Filing accounts and XBRL
- APB and QAD feedback
- Audit reports
- Going concern
- Accounting for and auditing related party transactions
- Group accounting and auditing

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 *	31 Mar	09:30-17:00
Birmingham	21 Mar & 11 Apr	09:30-17:00
Colchester	18 Mar	09:30-16:30
Exeter	15 Feb	09:30-16:30
Lancaster	15 Mar	09:30-17:00
Leicester	17 Mar	09:30-17:00
London	29 Mar & 19 Apr	09:30-16:30
Middlesbrough	19 Apr	09:30-17:00
Nottingham	8 Mar	09:30-17:00
Oxford	4 Mar	09:30-17:00
Peterborough	21 Mar	09:30-17:00
Sheffield	14 Apr	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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. Participants will revise the fundamental aspects of appropriate ISA+s and how to apply them in practice. 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
- 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
Lancaster	9 May	14:00-17:00
Oxford	4 Apr	09:30-13:00

Venue details provided with booking confirmation

£50 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 *	18 Oct	09:30-13:00
Birmingham	28 Jun & 5 Oct	09:30-13:00
Cambridge	21 Oct	09:30-13:00
Colchester	25 Oct	09:30-13:00
Exeter	6 Dec	13:30-16:30
High Wycombe	8 Mar	09:30-13:00
Lancaster	11 Mar	09:30-13:00
Leeds	12 Oct	09:30-13:00
Leicester	18 May	09:30-13:00
London	18 Oct & 9 Dec	09:30-13:00
Manchester	14 Oct	09:30-13:00
Middlesbrough	5 Apr	09:30-13:00
Newcastle	1 Nov	09:30-13:00
Northampton	10 Nov	09:30-13:00
Nottingham	19 Oct	09:30-13:00
Peterborough	5 Jul	09:30-13:00
Stirling *	11 Mar	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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.

Alternatively, the course will be useful for anyone wanting a refresher on company accounts disclosures or is unfamiliar with UK GAAP and disclosures having studied under international standards.

OBJECTIVES

The course will introduce the format and disclosure requirements of limited companies preparing accounts for their members.

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*	17 Oct	09:30-17:00
Birmingham	27 Jun & 4 Oct	09:30-17:00
Bristol	15 Mar	10:00-17:00
Cambridge	20 Oct	09:30-17:00
Colchester	24 Oct	09:30-16:30
High Wycombe	7 Mar	09:30-17:15
Lancaster	10 Mar	09:30-17:00
Leeds	11 Oct	09:30-17:00
Leicester	17 May	09:30-17:00
London	17 Oct & 8 Dec	09:30-16:30
Manchester	13 Oct	09:30-17:00
Middlesbrough	4 Apr	09:30-17:00
Newcastle	31 Oct	09:30-17:00
Northampton	9 Nov	09:30-17:00
Nottingham	18 Oct	09:30-17:00
Peterborough	4 Jul	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 plus VAT per person

Understanding Group Accounts

WHO SHOULD ATTEND

This course is essential for anyone new to the preparation of group accounts or requires a refresher as to the mechanics of the consolidated process.

The relevance of the course will depend upon the participants' level of experience in this area. Generally, it will be most appropriate for staff with 24 to 48 months experience in the profession. Alternatively, staff who will be preparing consolidated financial accounts who have not been involved in such assignments for some time, should attend.

OBJECTIVES

The focus of the course is on understanding the mechanics of the consolidation and the implications for the audit of group accounts.

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 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

Venue	Date	Time
Darlington	22 Mar	09:30-17:00

Venue details provided with booking confirmation

£100 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
- Determination of the Class 4 NIC liability
- Trading income computation
- Completion of the relevant self assessment pages

CPD HOURS: 6

Venue	Date	Time
Belfast *	11 Nov	09:30-17:00
Birmingham	18 Feb & 9 Nov	09:30-17:00
Bristol	22 Feb	10:00-17:00
Colchester	2 Dec	09:30-16:30
Exeter	24 Nov	09:30-16:30
High Wycombe	8 Feb	09:30-17:15
Lancaster	22 Feb	09:30-17:00
Leeds	23 Nov	09:30-17:00
Leicester	7 Dec	09:30-17:00
London	2 Mar & 18 Nov	09:30-16:30
Manchester	9 Dec	09:30-17:00
Middlesbrough	4 Feb	09:30-17:00
Newcastle	25 Nov	09:30-17:00
Northampton	16 Nov	09:30-17:00
Nottingham	18 Feb & 11 Nov	09:30-17:00
Oxford	11 Feb	09:30-17:00
Peterborough	3 Feb	09:30-17:00
Sheffield	9 Feb	09:30-17:00
Stirling *	5 Apr	09:30-16:30

Venue details provided with booking confirmation

* Alternative prices apply at these venues

£100 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
Bristol	5 Oct	13:30-17:00
Colchester	12 Oct	09:30-13:00
Darlington	16 Mar	09:30-13:00
Exeter	25 Nov	09:30-13:00
High Wycombe	9 Aug	09:30-13:00
Leeds	17 Oct	09:30-13:00
London	16 Feb & 7 Oct	09:30-13:00
Manchester	2 Nov	09:30-13:00
Newcastle	19 Oct	09:30-13:00
Oxford	26 Oct	09:30-13:00

Venue details provided with booking confirmation

£50 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
- Existing allowance rules
- Problem areas

CPD HOURS: 3

Venue	Date	Time
Belfast *	10 May	09:30-13:00
Colchester	2 Nov	13:30-16:30
High Wycombe	25 Oct	14:00-17:15
Leeds	18 Oct	14:00-17:00
London	18 Mar & 19 Apr	13:30-16:30
Manchester	3 Nov	14:00-17:00
Newcastle	20 Oct	14:00-17:00
Oxford	27 Oct	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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
- Short accounting periods, associated company rules
- 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

Participants need to be familiar with basic taxable trading income rules and capital allowances.

CPD HOURS: 3

Venue	Date	Time
Bristol	5 Oct	10:00-13:00
Colchester	12 Oct	13:30-16:30
Darlington	16 Mar	14:00-17:00
Exeter	25 Nov	13:30-16:30
High Wycombe	9 Aug	14:00-17:15
Leeds	17 Oct	14:00-17:00
London	16 Feb & 7 Oct	13:30-16:30
Manchester	2 Nov	14:00-17:00
Newcastle	19 Oct	14:00-17:00
Oxford	26 Oct	14:00-17:00

Venue details provided with booking confirmation

£50 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
Belfast	10 May	14:00-17:00

Venue details provided with booking confirmation

£60 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
Birmingham	22 Mar & 5 Apr	09:30-13:00
Bristol	3 Mar	13:30-17:00
Cambridge	13 Oct	09:30-13:00
Leicester	10 Mar	09:30-13:00
Northampton	28 Mar	09:30-13:00
Nottingham	23 Mar	09:30-13:00
Oxford	29 Mar	14:00-17:00
Peterborough	6 Apr	09:30-13:00

Venue details provided with booking confirmation

£50 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
Belfast *	27 Oct	09:30-17:00
Birmingham	22 Sep & 7 Oct	09:30-17:00
Exeter	13 Oct	09:30-16:30
Lancaster	14 Sep	09:30-17:00
Leicester	14 Oct	09:30-17:00
Northampton	25 Oct	09:30-17:00
Nottingham	10 Oct	09:30-17:00
Peterborough	4 Oct	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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 2011 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 *	28 Oct	09:30-17:00
Birmingham	21 Sep & 6 Oct	09:30-17:00
Bristol	4 Oct	10:00-17:00
Colchester	5 Oct	09:30-16:30
Exeter	12 Oct	09:30-16:30
High Wycombe	24 Oct	09:30-17:15
Lancaster	13 Sep	09:30-17:00
Leeds	29 Sep	09:30-17:00
Leicester	22 Sep	09:30-17:00
London	16 Sep & 27 Sep	09:30-16:30
Manchester	19 Sep	09:30-17:00
Newcastle	30 Sep	09:30-17:00
Nottingham	16 Sep	09:30-17:00
Oxford	28 Sep	09:30-17:00
Peterborough	27 Sep	09:30-17:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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 and calculation of PAYE
- Scope and calculation of National Insurance
- PAYE compliance
- Case study - month 10 payroll run

CPD HOURS: 3

Venue	Date	Time
Belfast *	23 Sep	09:30-13:00
Birmingham	11 Feb & 16 Sep & 30 Sep	09:30-13:00
Bristol	7 Sep	13:30-17:00
Colchester	30 Sep	09:30-13:00
Exeter	8 Sep	09:30-13:00
High Wycombe	10 Oct & 28 Jan	09:30-13:00
Lancaster	23 Sep	09:30-13:00
Leeds	23 Sep	09:30-13:00
Leicester	11 Feb & 9 Sep	09:30-13:00
London	11 Feb & 9 Sep & 23 Sep	09:30-13:00
Manchester	16 Sep	09:30-13:00
Newcastle	16 Sep	09:30-13:00
Nottingham	16 Sep	09:30-13:00
Oxford	23 Sep	09:30-13:00
Peterborough	23 Sep	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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 *	23 Sep	14:00-17:00
Birmingham	11 Feb & 16 Sep & 30 Sep	14:00-17:00
Bristol	7 Sep	10:00-13:00
Colchester	30 Sep	13:30-16:30
Exeter	8 Sep	13:30-16:30
High Wycombe	28 Jan & 10 Oct	14:00-17:15
Lancaster	23 Sep	14:00-17:00
Leeds	23 Sep	14:00-17:00
Leicester	11 Feb & 9 Sep	14:00-17:00
London	11 Feb & 9 Sep & 23 Sep	13:30-16:30
Manchester	16 Sep	14:00-17:00
Newcastle	16 Sep	14:00-17:00
Nottingham	16 Sep	14:00-17:00
Oxford	23 Sep	14:00-17:00
Peterborough	23 Sep	14:00-17:00
Stirling*	2 Nov	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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 familiarise participants 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
Colchester	16 Feb	09:30-13:00
Darlington	15 Mar	09:30-13:00
High Wycombe	4 Mar	09:30-13:00
Leeds	22 Mar	09:30-13:00
London	17 Mar & 18 Apr	09:30-13:00
Manchester	1 Mar	09:30-13:00
Newcastle	23 Mar	09:30-13:00
Sheffield	14 Mar	14:00-17:00
Stirling *	12 May	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 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

A general awareness of payroll procedures will be assumed.

CPD HOURS: 3

Venue	Date	Time
Darlington	15 Mar	14:00-17:00
Lancaster	1 Mar	09:30-13:00

Venue details provided with booking confirmation

£50 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 *	10 Nov	09:30-17:00
Birmingham	17 Feb & 8 Nov	09:30-17:00
Bristol	21 Feb	10:00-17:00
Colchester	1 Dec	09:30-16:30
Exeter	23 Nov	09:30-16:30
High Wycombe	7 Feb	09:30-17:15
Lancaster	21 Feb	09:30-17:00
Leeds	22 Nov	09:30-17:00
Leicester	6 Dec	09:30-17:00
London	1 Mar & 17 Nov	09:30-16:30
Manchester	8 Dec	09:30-17:00
Middlesbrough	3 Feb	09:30-17:00
Newcastle	24 Nov	09:30-17:00
Northampton	15 Nov	09:30-17:00
Nottingham	17 Feb & 10 Nov	09:30-17:00
Oxford	10 Feb	09:30-17:00
Peterborough	2 Feb	09:30-17:00
Sheffield	8 Feb	09:30-17:00
Stirling *	4 Apr	09:30-16:30

Venue details provided with booking confirmation

* Alternative prices apply at these venues

£100 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
Birmingham	22 Mar & 5 Apr	14:00-17:00
Cambridge	13 Oct	14:00-17:00
Leicester	10 Mar	14:00-17:00
Northampton	28 Mar	14:00-17:00
Nottingham	23 Mar	14:00-17:00
Peterborough	6 Apr	14:00-17:00

Venue details provided with booking confirmation

£50 plus VAT per person

Tax Issues Arising from Accounts Review

WHO SHOULD ATTEND

Seniors and staff who are responsible for the accounts and preparation of 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 be familiar with the format of company accounts. The course will deal with taxation issues identified 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 accounts preparation 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
Colchester	2 Nov	09:30-13:00
High Wycombe	25 Oct	09:30-13:00
Leeds	18 Oct	09:30-13:00
London	18 Mar & 19 Apr	09:30-13:00
Manchester	3 Nov	09:30-13:00
Newcastle	20 Oct	09:30-13:00
Sheffield	15 Mar	09:30-13:00

Venue details provided with booking confirmation

£50 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
Birmingham	6 Apr & 13 May	14:00-17:00
Colchester	16 Feb	13:30-16:30
High Wycombe	4 Mar	14:00-17:15
Lancaster	1 Mar	14:00-17:00
Leeds	22 Mar	14:00-17:00
Leicester	11 Mar	14:00-17:00
London	17 Mar & 18 Apr	13:30-16:30
Manchester	1 Mar	14:00-17:00
Newcastle	23 Mar	14:00-17:00
Nottingham	24 Mar	14:00-17:00
Peterborough	7 Apr	14:00-17:00

Venue details provided with booking confirmation

£50 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
Bristol	29 Mar	10:00-13:00
Exeter	30 Mar	13:30-16:30
Oxford	27 Oct	14:00-17:00
Sheffield	15 Mar	14:00-17:00
Stirling *	12 May	13:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£50 plus VAT per person

Practical Use of Excel (v.2003)

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 and 2010 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	14 Nov	09:30-17:00
Nottingham	19 May	09:30-17:00
Peterborough	15 Apr	09:30-17:00

Venue details provided with booking confirmation

£130 plus VAT per person

Practical Use Of Excel (v.2010)

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.

Users upgrading from Excel 2000, Excel XP or Excel 2003 in particular will find this course of use. This course uses Excel 2010 but will also be suitable for users of v. 2007. Please note that there is an alternative course for users of Excel 2003 and earlier versions.

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.

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

Participants may bring along a USB device if they wish to save copies of their worksheets.

Numbers limited to 12 participants

CPD HOURS: 6

Venue	Date	Time
Birmingham	8 Mar	09:30-17:00
Leicester	15 Jun	09:30-17:00
Northampton	17 Nov	09:30-17:00

Venue details provided with booking confirmation

£130 plus VAT per person

Sage 50: Forecasting (v.2007) (Basic)

WHO SHOULD ATTEND

This course is suitable for those wishing to learn how to create forecasts and use the standard reports within the Sage 50 Forecasting software. This product training course is designed for staff in the profession, and so a good understanding of accounting principles and an overall appreciation of forecasting methodology are assumed.

Users of Sage WinForecast Professional (v.4) will derive little benefit from this course unless they are due to upgrade to v.2007 in the near future.

Sage 50 Forecasting version 2007 is used on this course.

OBJECTIVES

A modular based hands-on course covering the basic aspects of Sage 50 Forecasting (v.2007). A case study based on a typical SME client with a £1m turnover, will form the basis of the course.

CONTENT

Topics covered include:

- Planning and creating a new forecast
- Setting forecast options and profiles
- Creating sections, sub-sections and records
- Entering record assumptions and values
- Flexing the forecast
- Reports and graphs

Numbers limited to 12 participants

CPD HOURS: 3

Venue	Date	Time
Stirling	19 Sep	13:30-16:30

Venue details provided with booking confirmation

£85 plus VAT per person

Sage 50: Forecasting (V.2007) Advanced

WHO SHOULD ATTEND

This course is suitable for those who have already attended the Introductory Sage Forecasting half day course. Since attending the Introductory course, participants should have used Sage 50 Forecasting (v.5, v.12 or v.2007) to produce a number of forecasts for clients.

Anyone who has not attended the Introductory session should have used this version of the package to produce a number of forecasts for different clients.

Users of Sage WinForecast Professional (v.4) will derive little benefit from this course unless they are due to upgrade to v.2007 in the near future.

Sage 50 Forecasting version 2007 is used on this course.

OBJECTIVES

A hands on course covering the more advanced modules of Sage 50 Forecasting (v.2007).

CONTENT

Topics covered include:

- Departments and Sub-Departments
- Using Memo records
- Dealing with advanced functions
  - Record formulae
  - Payroll/Wages
  - Stock and component stock
  - Multi-currency
  - Factoring and financing
  - Fixed assets (revaluation)
  - Dividends and Provisions
- Linking to other packages (Hot Links)
- Excel report generation

Numbers limited to 12 participants

CPD HOURS: 3

Venue	Date	Time
Exeter	6 Apr	13:30-16:30

Venue details provided with booking confirmation

£70 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	4 Mar & 1 Dec	09:30-17:00
Colchester	10 Feb	09:30-16:30
Exeter	5 Apr	09:30-16:30
High Wycombe	24 Mar	09:30-17:15
Leeds	13 Oct	09:30-17:00
Leicester	22 Mar	09:30-17:00
London	19 Oct & 22 Nov	09:30-16:30
Manchester	10 Nov	09:30-17:00
Newcastle	14 Oct	09:30-17:00
Nottingham	3 Nov	09:30-17:00
Stirling *	20 Sep	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£130 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	9 Mar & 15 Nov	09:30-17:00
Bristol	13 Sep	10:00-17:00
High Wycombe	6 Dec	09:30-17:15
Leicester	14 Jun	09:30-17:00
Northampton	24 Feb	09:30-17:00
Nottingham	5 Jul	09:30-17:00
Oxford	13 Apr	09:30-17:00

Venue details provided with booking confirmation

£130 plus VAT per person

Sage 50 Accounts: Data Extraction Using Excel

WHO SHOULD ATTEND

Participants should be familiar with Sage 50 and be reasonably proficient at using the core modules (Customers/Suppliers/Nominal and Financials) and menu options.

Experience of using Sage in a client environment would also be useful.

A good basic knowledge of Excel is also required.

Versions - Sage 50 v.2010 and Excel v.2003 (and references to Excel v.2007 also).

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

Numbers limited to 12 participants

CPD HOURS: 3

Venue	Date	Time
Birmingham	3 Mar & 16 Nov	14:00-17:00
Bristol	12 Sep	13:30-17:00
Exeter	6 Apr	09:30-13:00
Leicester	13 Jun	14:00-17:00
Nottingham	4 Jul	14:00-17:00
Peterborough	14 Apr	14:00-17:00
Stirling *	2 Feb	09:30-13:00

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£70 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 advisor 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.

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

CONTENT

- Sage and Sage 50 overview
- Updated options and new reports
- Company Settings – performing a healthcheck
- Chart of Accounts Layouts – performing a healthcheck
- Dealing with returned cheques, write-offs and other corrections
- Bank reconciliation
- Manage VAT module
- Creating recurring entries and Skeleton journals
- Data integrity tools and Audit Assistant
- Month end
- Year end update, Archiving and Audit Trail clear-down
- Export/Import data
- Overview of Foreign Trader module
- Overview of Project Costing module

CPD HOURS: 3

Venue	Date	Time
Stirling	1 Feb	13:30-16:30

Venue details provided with booking confirmation

£85 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
Birmingham	25 Feb	09:30-17:00
Colchester	15 Apr	09:30-16:30
High Wycombe	25 Nov	09:30-17:15
Leeds	18 Feb	09:30-17:00
Leicester	25 Feb	09:30-17:00
London	21 Jan & 3 Jun	09:30-16:30
Manchester	11 Feb	09:30-17:00
Newcastle	4 Feb	09:30-17:00
Nottingham	10 Jun	09:30-17:00
Oxford	24 May	09:30-17:00
Peterborough	4 Feb	09:30-17:00
Sheffield	10 Feb	09:30-17:00

Venue details provided with booking confirmation

£100 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
Birmingham	10 May & 6 Jul	09:30-13:00
Leicester	9 Jun	09:30-13:00
Nottingham	20 May	09:30-13:00
Peterborough	19 May	09:30-13:00

Venue details provided with booking confirmation

£50 plus VAT per person

Effective Time Management

WHO SHOULD ATTEND

The course is a "must" for anyone in senior assistant / new manager positions where time management starts to become essential.

The relevance of the course will depend upon participants' level of responsibility and practical experience. As a guideline however, it is likely to be most appropriate for those with three to six years' experience in the profession, and who are able to schedule their workload and to delegate work to more junior staff.

OBJECTIVES

At the end of the course participants will be more aware of the need to manage their time effectively, and have gained some practical tips for doing so.

CONTENT

- General introduction to the importance of good time management
- Consideration of common 'time wasters' and what can be done about them, by means of group discussion
- Introduction of tools for scheduling and prioritising tasks
- Planning ahead and deadline management
- Delegating work - the pitfalls and the benefits
- Feedback skills - ensuring quality communication

The course uses a combination of lecture sessions and individual and group exercises to apply the principles to the realistic problems faced by busy accountants.

CPD HOURS: 3

Venue	Date	Time
Birmingham	10 May & 6 Jul	14:00-17:00
Leicester	9 Jun	14:00-17:00
Nottingham	20 May	14:00-17:00
Peterborough	19 May	14:00-17:00

Venue details provided with booking confirmation

£50 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

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
Belfast *	13 Oct	09:30-17:00
Sheffield	15 Apr	09:30-17:00
Stirling *	3 Nov	09:30-16:30

* Alternative prices apply at these venues

Venue details provided with booking confirmation

£100 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.

Dealing with complaints.

Numbers limited to 15 participants

CPD HOURS: 6

Venue	Date	Time
Colchester	17 Nov	09:30-16:30
Exeter	9 Dec	09:30-16:30
High Wycombe	14 Jul	09:30-17:15
Lancaster	10 May	09:30-17:00
Leeds	10 May	09:30-17:00
London	12 Jan & 20 Apr	09:30-16:30
Manchester	26 May	09:30-17:00
Newcastle	27 May	09:30-17:00

Venue details provided with booking confirmation

£100 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

Numbers limited to 12 participants

CPD HOURS: 3

Venue	Date	Time
Oxford	23 May	14:00-17:00

Venue details provided with booking confirmation

£50 plus VAT per person

CPD Season Ticket Programmes

Our flexible season ticket costs just £475* for 10 CPD places with any number of additional places at just £47.50* 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 £47.50* and can be booked at any time throughout 2011.

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

For those not wanting to buy 10 or more places, 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 86 or refer to page 84 for a review of all the booking options.

*£720/£60 in Northern Ireland.

Aberdeen

PAYE, Benefits & NI Update	14 Mar
Capital Taxes - Recent Developments	12 Apr
The Tax Man Cometh - Handling Revenue Enquiries	18 May
Effective Analytical Procedures for the Business Adviser	2 Jun
VAT Update and Problem Areas	23 Jun
Finance Act 2011	12 Sep
Accountancy Update and Current Issues	27 Sep
The Reporting Requirements of Small Companies	17 Oct
Topical Tax Issues	15 Nov
Audit Update	7 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	29 Mar
Accountancy Update and Current Issues	pm	29 Mar
Personal Tax Planning: Current Issues	am	6 Apr
PAYE and Benefits Update	pm	6 Apr
Improving Personal Productivity and Effectiveness	am	10 May
Charities: Common Accounting Issues	pm	25 May
Finance Act 2011	am	7 Sep
Business Tax: Problem Areas	pm	7 Sep
Common Accounting Problems	am	20 Oct
Analytical Business Procedures for the Business Advisor	pm	20 Oct
Topical Tax Issues	am	30 Nov
VAT Update and Problem Areas	pm	30 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

PAYE, Benefits & NI Update	24 Feb
Accountancy Update and Current Issues	21 Mar
Audit Update	13 Apr
Tax Planning for Family Companies	3 May
Charities: Current Issues	19 May
Inheritance Tax Planning including Trusts	8 Jun
Laws & Regulations for the Practising Accountant	23 Jun
Finance Act 2011	7 Sep
Delivering Service Excellence and Developing Client Advocacy	20 Sep
The Reporting Requirements of Small Companies	4 Oct
Detecting Fraud and Advising on Preventing Fraud	18 Oct
Topical Tax Issues	17 Nov
VAT Update and Problem Areas	6 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

Audit Update	am 23 Feb [1] pm 23 Feb [1]
Personal Tax Planning: Current Issues	am 28 Feb [1] pm 28 Feb [1]
Business Valuations	pm 21 Mar [2]
Accountancy Update and Current Issues	am 31 Mar [1] pm 31 Mar [1]
Business Tax: Problem Areas	am26 May [1] pm26 May [1]
Delivering Service Excellence and Developing Client Advocacy	pm 8 Jun [1]
Capital Taxes - Recent Developments	pm 20 Jun [2]
Finance Act 2011	am 6 Sep [1] pm 6 Sep [1]
Common Accounting Problems	am 28 Sep [1] pm 28 Sep [1]
VAT Update and Problem Areas	am 26 Oct [1] pm 26 Oct [1]
Topical Tax Issues	am 1 Dec [1] pm 1 Dec [1]
Detecting Fraud and Advising on Preventing Fraud	am 15 Dec [1] pm 15 Dec [1]

TIMINGS AND VENUE

[1] Birmingham City Thistle Hotel
St Chads Queensway, Birmingham B4 6HY
Tel: 0121 236 4211

[2] Jurys Inn
245 Broad Street, Birmingham B1 2HQ
Tel: 0121 606 9000

am: 9:15-12:15 pm: 14:30-17:30

Bracknell

Audit Update	am	6 Apr
Topical Tax Issues	pm	6 Apr
The Reporting Requirements of Small Companies	am	10 May
PAYE, Benefits & NI Update	pm	10 May
Laws & Regulations for the Practising Accountant	am	7 Jun
Inheritance Tax Planning including Trusts	pm	7 Jun
Finance Act 2011	am	13 Oct
Tax Planning for Family Companies	pm	13 Oct
VAT Update and Problem Areas	am	21 Nov
Accountancy Update and Current Issues	pm	21 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	pm	7 Feb
Preparing and Implementing a Business Sale and Exit	pm	1 Mar
PAYE, Benefits & NI Update	pm	7 Apr
Accountancy Update and Current Issues	am pm	12 May 12 May
VAT Update and Problem Areas	pm	9 Jun
The Link between Accounting Standards & Tax Treatment	pm	22 Jun
Finance Act 2011	am pm	21 Sep 21 Sep
Audit Update	pm	10 Oct
Tax, Legal and Accounting Implications of Transactions between a Company and its Directors	am pm	10 Nov 10 Nov
The Tax Man Cometh - Handling Revenue Enquiries	pm	6 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

Obtaining Finance for the Smaller Business	8 Feb
Tax Planning for Owner Managers	3 Mar
VAT Update including Cross Border Trading	30 Mar
Accountancy Update and Current Issues	25 May
Finance Bill 2011	5 Jul
Audit Update	13 Oct
The Tax Man Cometh - Handling Revenue Enquiries	2 Nov
General Tax Update	28 Nov

TIMINGS AND VENUE

Ravenwood Hall Hotel, Rougham
Bury St Edmunds IP30 9JA
Tel: 01359 270 345

pm: 15:00-18:00

Cambridge

Personal Tax Planning: Current Issues	17 Feb [2]
Audit Update	7 Mar [1]
Accountancy Update and Current Issues	30 Mar [1]
Business Tax: Problem Areas	17 May [1]
Delivering Service Excellence and Developing Client Advocacy	25 May [1]
Capital Taxes - Recent Developments	16 Jun [2]
Common Accounting Problems	12 Sep [2]
Finance Act 2011	28 Sep [1]
VAT Update and Problem Areas	10 Oct [1]
Topical Tax Issues	17 Nov [1]

TIMINGS AND VENUE

[1] Menzies Cambridge Hotel,
Bar Hill, Cambridge,
Cambridgeshire CB23 8EU
Tel: 01954 249988

[2] Cambridge Belfry,
Cambourne, Cambridge,
Cambridgeshire CB23 6BW
Tel: 01954 714600

pm: 15:00-18:00

Colchester

Capital Taxes Update	16 Feb [1]
Accountancy Update and Current Issues	8 Mar [2]
Planning to Retain the Wealth of the Elderly	4 Apr [1]
Preparing and Implementing a Business Sale and Exit	10 May [1]
VAT Update including Cross Border Trading	23 May [2]
Finance Bill 2011	16 Jun [2]

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

[1] Rivenhall Hotel
Rivenhall End, Witham, Nr Chelmsford,
Essex, CM8 3HB
Tel: 01376 516 969

[2] Marks Tey Hotel
London Road, Marks Tey, Colchester,
Essex, CO6 1DU
Tel: 01206 210 001

pm: 15:30-18:30

Coventry

Employment Law Update	27 Jan
VAT: Cross Border Trading	9 Feb 24 Feb
Auditing in a Recessionary Environment	16 Feb 1 Mar
Advanced Aspects of Corporation Tax	8 Mar 24 Mar
Common Accounting Problems	5 Apr 13 Apr
Finance Bill 2011	25 May 7 Jun

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

Holiday Inn
Hinkley Road, Coventry CV2 2HP
Tel: 0870 400 9021

pm: 15:30-18:30

Darlington

Topical Tax Issues	pm	9 Feb [1]
VAT Update including Cross Border Trading	am	23 Mar [2]
Accountancy Update and Current Issues	pm	19 Apr [1]
The Tax Man Cometh - Handling Revenue Enquiries	am	24 May [1]
Delivering Service Excellence and Developing Client Advocacy	pm	21 Jun [2]

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

[1] Darlington Football Club
Darlington Arena, Neasham Road,
Darlington DL2 1DL
Tel: 01325 387000

[2] St George Hotel, Tees Valley Airport,
Darlington, County Durham DL2 1RH
Tel: 01325 332631

am: 9:30-12:30 pm: 14:00-17:00

Derby

Personal Tax Planning: Current Issues	16 Feb
Audit Update	1 Mar
Business Valuations	14 Mar
Accountancy Update and Current Issues	5 Apr
Delivering Service Excellence and Developing Client Advocacy	24 May
Business Tax: Problem Areas	8 Jun
Capital Taxes - Recent Developments	21 Jun
Finance Act 2011	20 Sep
Common Accounting Problems	28 Sep
VAT Update and Problem Areas	19 Oct
Topical Tax Issues	22 Nov
Detecting Fraud and Advising on Preventing Fraud	5 Dec

TIMINGS AND VENUE

Derby County Football Club, Pride Park
Stadium, Wyvern Link Road, Derby DE24 8XL
Tel: 01332 202202

pm: 14:30-17:30

Edinburgh

PAYE, Benefits & NI Update	15 Mar
Capital Taxes - Recent Developments	11 Apr
The Tax Man Cometh - Handling Revenue Enquiries	19 May
Effective Analytical Procedures for the Business Adviser	1 Jun
VAT Update and Problem Areas	20 Jun
Finance Act 2011	13 Sep
Accountancy Update and Current Issues	26 Sep
The Reporting Requirements of Small Companies	18 Oct
Topical Tax Issues	17 Nov

TIMINGS AND VENUE

Holiday Inn Edinburgh
132 Corstorphine Road, Edinburgh, EH12 6UA
Tel: 0871 9429026

pm: 13:30-16:30

Exeter

Topical Tax Issues	8 Feb
Obtaining Finance for the Smaller Business	31 Mar
The Tax Man Cometh - Handling Revenue Enquiries	14 Apr
Accountancy Update and Current Issues	3 May
Tax Implications of Marriage, Cohabitation, Separation and Divorce	23 May
Business Tax: Problem Areas	23 Jun
Finance Act 2011	20 Sep
Audit Update	11 Oct
Capital Gains Tax - A Current Perspective	26 Oct
Common Accounting Problems	9 Nov
Tax Credits Workshop	12 Dec

TIMINGS AND VENUE

Sandy Park Conference Centre,
Sandy Park Way, Exeter, Devon, EX2 7NN
Tel: 01392 427427

pm: 14:00-17:00

Glasgow

Detecting Fraud and Advising on Preventing Fraud	15 Feb
PAYE, Benefits & NI Update	22 Mar
Capital Taxes - Recent Developments	13 Apr
The Tax Man Cometh - Handling Revenue Enquiries	11 May
Effective Analytical Procedures for the Business Adviser	31 May
VAT Update and Problem Areas	21 Jun
Finance Act 2011	15 Sep
Accountancy Update and Current Issues	28 Sep
The Reporting Requirements of Small Companies	20 Oct
Topical Tax Issues	14 Nov
Audit Update	8 Dec

TIMINGS AND VENUE

The Glynhill Hotel, 169 Paisley Road,
Renfrew PA4 8XB
Tel: 0141 886 5555

pm: 13:30-16:30

Gravesend

PAYE, Benefits & NI Update	28 Feb
Accountancy Update and Current Issues	16 Mar
Audit Update	7 Apr
Tax Planning for Family Companies	26 May
Inheritance Tax Planning including Trusts	23 Jun
Finance Act 2011	8 Sep
The Reporting Requirements of Small Companies	27 Sep
Detecting Fraud and Advising on Preventing Fraud	17 Oct
VAT Update and Problem Areas	15 Nov
Topical Tax Issues	6 Dec

TIMINGS AND VENUE

Best Western Manor Hotel, Hever Court Road,
Singlewell, Gravesend, Kent DA12 5UQ
Tel: 01474 353100

pm: 14:00-17:15

Hatfield

PAYE, Benefits & NI Update	15 Mar
Accountancy Update and Current Issues	19 Apr
Tax Planning for Family Companies	16 Jun
Finance Act 2011	27 Sep
The Reporting Requirements of Small Companies	13 Oct
VAT Update and Problem Areas	16 Nov
Topical Tax Issues	8 Dec

High Wycombe

PAYE, Benefits & NI Update	pm	14 Mar
Accountancy Update and Current Issues	pm	23 Mar
Audit & Accountancy Update	pm	4 Apr
Audit Update	pm	13 Apr
Tax Update	am pm am pm	5 May 14 Jul 1 Nov 1 Nov
Tax Planning for Family Companies	pm	5 May
Charities: Current Issues	pm	24 May
Inheritance Tax Planning including Trusts	pm	21 Jun
Laws & Regulations for the Practising Accountant	pm	6 Jul
Audit & Accountancy Update	pm	7 Sep
Finance Act 2011	am pm	22 Sep 22 Sep
Delivering Service Excellence and Developing Client Advocacy	pm	12 Oct
The Reporting Requirements of Small Companies	pm	17 Oct
Detecting Fraud and Advising on Preventing Fraud	pm	25 Oct
Accountancy Update and Current Issues	pm	8 Nov
VAT Update and Problem Areas	pm	29 Nov
Topical Tax Issues	pm	13 Dec

Ipswich

PAYE, Benefits & NI Update	am pm	8 Mar 8 Mar
Accountancy Update and Current Issues	am pm	23 Mar 23 Mar
Audit Update	pm	20 Apr
Tax Planning for Family Companies	am pm	17 May 17 May
Inheritance Tax Planning including Trusts	am pm	28 Jun 28 Jun
Finance Act 2011	am pm	20 Sep 20 Sep
The Reporting Requirements of Small Companies	am pm	11 Oct 11 Oct
Detecting Fraud and Advising on Preventing Fraud	pm	24 Oct
Topical Tax Issues	am pm	16 Nov 16 Nov
VAT Update and Problem Areas	am pm	30 Nov 30 Nov

TIMINGS AND VENUE

Hatfield Oak Hotel
Roehyde Way, Hatfield AL10 9AF
Telephone: 01707 275701

pm: 14:00-17:15

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

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

The Tax Man Cometh - Handling Revenue Enquiries	10 Feb
Accountancy Update and Current Issues	22 Mar
Incorporation v Non Incorporation	5 Apr
Top Tips for Delivering the Profitable Assignment	23 May
Business Tax: Problem Areas	9 Jun
Finance Act 2011	14 Sep
Charities: Current Issues	3 Oct
VAT Update including Cross Border Trading	20 Oct
Inheritance Tax Planning including Trusts	1 Nov
Audit Update	16 Nov
Topical Tax Issues	1 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

PAYE, Benefits & NI Update	16 Feb
Accountancy Update and Current Issues	9 Mar
Tax Planning for Family Companies	24 May
Laws & Regulations for the Practising Accountant	15 Jun
Inheritance Tax Planning including Trusts	6 Jul
Finance Act 2011	7 Sep
The Reporting Requirements of Small Companies	13 Oct
Detecting Fraud and Advising on Preventing Fraud	26 Oct
Topical Tax Issues	9 Nov
VAT Update and Problem Areas	12 Dec

TIMINGS AND VENUE

Holiday Inn
Leeds/Garforth, Wakefield Road
Garforth, Leeds LS25 1LH
Tel: 0113 286 6556

pm: 14:00-17:15

Leicester

Personal Tax Planning: Current Issues	pm am	14 Feb [2] 10 Mar [3]
Audit Update	pm pm	24 Feb [3] 15 Mar [1]
Accountancy Update and Current Issues	am am pm	29 Mar [3] 14 Apr [1] 14 Apr [1]
Business Valuations	am	5 Apr [2]
Business Tax: Problem Areas	am pm	11 May [1] 24 May [3]
Delivering Service Excellence and Developing Client Advocacy	am	17 May [2]
Capital Taxes - Recent Developments	pm am	13 Jun [3] 23 Jun [2]
Common Accounting Problems	pm pm	8 Sep [3] 10 Oct [2]
Finance Act 2011	am pm pm	21 Sep [1] 21 Sep [1] 29 Sep [3]
VAT Update and Problem Areas	am pm	18 Oct [3] 27 Oct [1]
Topical Tax Issues	am am pm	15 Nov [3] 29 Nov [1] 29 Nov [1]
Detecting Fraud and Advising on Preventing Fraud	am	8 Dec [2]

TIMINGS AND VENUE

[1] Leicester City Football Club,
The Walkers Stadium, Filbert Way,
Leicester LE2 7FL
Tel: 0844 815 7000

[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

PAYE, Benefits & NI Update	pm	21 Feb
Accountancy Update and Current Issues	pm	7 Mar
Audit Update	pm	14 Apr
Charities: Current Issues	pm	9 May
Tax Planning for Family Companies	pm	23 May
Inheritance Tax Planning including Trusts	pm	6 Jun
Laws & Regulations for the Practising Accountant	pm	27 Jun
Delivering Service Excellence and Developing Client Advocacy	pm	6 Sep
Finance Act 2011	am pm	26 Sep 26 Sep
The Reporting Requirements of Small Companies	pm	10 Oct
Detecting Fraud and Advising on Preventing Fraud	pm	26 Oct
Topical Tax Issues	am pm	23 Nov 23 Nov
VAT Update and Problem Areas	am pm	5 Dec 5 Dec

Londonderry

Audit Update	am	28 Mar
Accountancy Update and Current Issues	pm	28 Mar
Personal Tax Planning: Current Issues	am	5 Apr
PAYE and Benefits Update	pm	5 Apr
Improving Personal Productivity and Effectiveness	pm	9 May
Charities: Common Accounting Issues	am	26 May
Finance Act 2011	am	6 Sep
Business Tax: Problem Areas	pm	6 Sep
Common Accounting Problems	am	19 Oct
Analytical Business Procedures for the Business Advisor	pm	19 Oct
Topical Tax Issues	am	29 Nov
VAT Update and Problem Areas	pm	29 Nov

Manchester

PAYE, Benefits & NI Update	23 Feb
Accountancy Update and Current Issues	10 Mar
Audit Update	19 Apr
Charities: Current Issues	11 May
Tax Planning for Family Companies	25 May
Inheritance Tax Planning including Trusts	5 Jul
Finance Act 2011	21 Sep
The Reporting Requirements of Small Companies	12 Oct
Detecting Fraud and Advising on Preventing Fraud	20 Oct
Topical Tax Issues	30 Nov
VAT Update and Problem Areas	13 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

Middlesbrough

Topical Tax Issues	am	17 Feb
How to Act as an Executor	am	1 Mar
VAT Update including Cross Border Trading	pm	10 Mar
Use of Trusts for Tax Planning	pm	21 Mar
Accountancy Update and Current Issues	am	7 Apr
The Tax Man Cometh - Handling Revenue Enquiries	pm	9 May
Planning to Retain the Wealth of the Elderly	pm	18 May

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

Middlesbrough Football Club
Riverside Stadium, Middlesbrough TS3 6RS
Tel: 01642 757686

am: 09:30-12:30 pm: 14:00-17:00

Milton Keynes

PAYE, Benefits & NI Update	15 Feb
Accountancy Update and Current Issues	15 Mar
Audit Update	5 Apr
Tax Planning for Family Companies	9 May
Inheritance Tax Planning including Trusts	30 Jun
Laws & Regulations for the Practising Accountant	12 Jul
The Reporting Requirements of Small Companies	8 Sep
Finance Act 2011	21 Sep
Detecting Fraud and Advising on Preventing Fraud	20 Oct
VAT Update and Problem Areas	8 Nov
Topical Tax Issues	29 Nov

TIMINGS AND VENUE

Kents Hill Park, Training and Conference Centre, Timbold Drive, Milton Keynes
Buckinghamshire, MK7 6TT
Tel: 01908 358000

pm: 14:00-17:15

Newbury

PAYE, Benefits & NI Update	1 Mar
Audit Update	4 Apr
Tax Planning for Family Companies	12 May
VAT Update and Problem Areas	8 Jun
Inheritance Tax Planning including Trusts	29 Jun
Finance Act 2011	12 Sep
The Reporting Requirements of Small Companies	22 Sep
Detecting Fraud and Advising on Preventing Fraud	19 Oct
Accountancy Update and Current Issues	15 Nov
Topical Tax Issues	7 Dec

TIMINGS AND VENUE

Newbury Rugby Club, Monks Lane,
Newbury, Berks RG14 7RW
Tel: 01635 40103

pm: 14:00-17:15

Newcastle

PAYE, Benefits & NI Update	17 Feb
Accountancy Update and Current Issues	17 Mar
Audit Update	11 Apr
Tax Planning for Family Companies	16 May
Laws & Regulations for the Practising Accountant	16 Jun
Inheritance Tax Planning including Trusts	7 Jul
Finance Act 2011	8 Sep
The Reporting Requirements of Small Companies	22 Sep
Detecting Fraud and Advising on Preventing Fraud	27 Oct
Topical Tax Issues	10 Nov
VAT Update and Problem Areas	8 Dec

Northampton

Personal Tax Planning: Current Issues	am pm	9 Feb [2] 10 Mar [1]
Audit Update	am pm	10 Feb [1] 2 Mar [2]
Business Valuations	am	22 Mar [1]
Accountancy Update and Current Issues	pm pm	29 Mar [1] 11 Apr [2]
Delivering Service Excellence and Developing Client Advocacy	am	11 May [2]
Business Tax: Problem Areas	am pm	19 May [1] 7 Jun [2]
Capital Taxes - Recent Developments	am pm	15 Jun [1] 28 Jun [2]
Common Accounting Problems	am pm	8 Sep [1] 26 Sep [2]
Finance Act 2011	am pm	14 Sep [2] 3 Oct [1]
VAT Update and Problem Areas	am pm	11 Oct [2] 20 Oct [1]
Topical Tax Issues	pm am	15 Nov [1] 30 Nov [2]
Detecting Fraud and Advising on Preventing Fraud	am	14 Dec [1]

Norwich

PAYE, Benefits & NI Update	7 Mar
Accountancy Update and Current Issues	22 Mar
Audit Update	11 Apr
Charities: Current Issues	17 May
Tax Planning for Family Companies	9 Jun
Inheritance Tax Planning including Trusts	27 Jun
Laws & Regulations for the Practising Accountant	13 Jul
Finance Act 2011	19 Sep
The Reporting Requirements of Small Companies	10 Oct
Detecting Fraud and Advising on Preventing Fraud	24 Oct
Topical Tax Issues	15 Nov
VAT Update and Problem Areas	1 Dec

TIMINGS AND VENUE

Newcastle Marriott Hotel, Metro Centre
Gateshead, Tyne & Wear, NE11 9XF
Tel: 0191 493 2233

pm: 15:30-18:30

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

TIMINGS AND VENUE

Holiday Inn, Norwich North.
Cromer Road, Norwich NR6 6JA
Tel: 01603 201125

pm: 13:30-16:45

Nottingham

Personal Tax Planning: Current Issues	am pm	16 Feb [2] 3 Mar [1]
Audit Update	am pm	22 Feb [1] 9 Mar [2]
Business Valuations	pm	17 Mar [1]
Accountancy Update and Current Issues	am pm	5 Apr [2] 20 Apr [1]
Business Tax: Problem Areas	pm am	12 May [2] 25 May [1]
Delivering Service Excellence and Developing Client Advocacy	pm	7 Jun [1]
Capital Taxes - Recent Developments	am pm	14 Jun [1] 27 Jun [2]
Finance Act 2011	pm am	5 Sep [1] 22 Sep [2]
Common Accounting Problems	am pm	14 Sep [1] 3 Oct [2]
VAT Update and Problem Areas	pm am	13 Oct [1] 25 Oct [2]
Topical Tax Issues	pm am	14 Nov [1] 23 Nov [2]
Detecting Fraud and Advising on Preventing Fraud	pm	6 Dec [2]

Oxford

Tax Planning for Higher Earners	3 Feb
VAT Update including Cross Border Trading	22 Feb 23 Mar
Audit Update	3 Mar 14 Mar
Accountancy Update and Current Issues	5 Apr 9 May
Employment Law Update	25 May
Charities: Current Issues	9 Jun
Finance Act 2011	8 Sep 19 Sep
Gaining Benefit from Effective Assignment Review and Close Down	6 Oct
Tax Planning for Family Companies	19 Oct 1 Nov
Improving Personal Productivity and Effectiveness	9 Nov
Topical Tax Issues	22 Nov 5 Dec

Peterborough

Audit Update	21 Feb
Personal Tax Planning: Current Issues	14 Mar
Business Valuations	4 Apr
Accountancy Update and Current Issues	18 Apr
Business Tax: Problem Areas	4 May
Capital Taxes - Recent Developments	6 Jun
Finance Act 2011	22 Sep
Common Accounting Problems	17 Oct
VAT Update and Problem Areas	31 Oct
Topical Tax Issues	21 Nov
Detecting Fraud and Advising on Preventing Fraud	12 Dec

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

TIMINGS AND VENUE

The Oxford Centre, 333 Banbury Road,
Summertown, Oxford OX2 7PL
Tel: 01865 554 719

pm: 15:30-18:30

TIMINGS AND VENUE

Holiday Inn, Peterborough West
Thorpe Wood,
Peterborough PE3 6SG
Tel: 01733 289988

pm: 15:00-18:00

Sheffield

Topical Tax Issues	pm pm	8 Feb [1] 16 Feb [2]
Solicitors' Accounts Rules Update	pm	10 Mar [2]
Capital Taxes Update	pm pm	18 May [2] 24 May [1]
Audit & Accountancy Update	pm am pm	7 Jun [2] 15 Jun [1] 20 Jun [3]

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

[1] Aston Hall Hotel,
Worksop Road, Aston, Sheffield S26 2EE
Tel: 0114 287 2309

[2] Sheffield United Football Club,
Bramall Lane, Sheffield, S2 4SU
Tel: 0870 458 3671

[3] The Sheffield Masonic Hall,
Shore Lane, Fulwood, Sheffield S10 3BU
Tel: 0114 266 0051

am: 09:30-12:30
pm: 14:00-17:00 or 16:00-19:00

Solihull

Topical Tax Issues	15 Feb 24 Feb
Personal Tax Planning: Current Issues	17 Mar
Preparing and Implementing a Business Sale and Exit	29 Mar
Common Accounting Problems	20 Apr
Tax Planning for Family Companies	18 May
VAT Update and Problem Areas	9 Jun 21 Jun

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

Old Silhillians Association
Memorial Clubhouse & Ground,
Warwick Road, Knowle, Solihull,
West Midlands B93 9LW
Tel: 01564 777680

pm: 15:30-18:30

Southend

PAYE, Benefits & NI Update	8 Feb
Accountancy Update and Current Issues	14 Mar
Tax Planning for Family Companies	13 Jun
Inheritance Tax Planning including Trusts	4 Jul
Finance Act 2011	15 Sep
The Reporting Requirements of Small Companies	11 Oct
Topical Tax Issues	8 Nov
VAT Update and Problem Areas	23 Nov

TIMINGS AND VENUE

Saxon Hall, Southend Masonic Centre Ltd,
Aviation Way, Southend-on-Sea, Essex SS2 6UN
Tel: 01702 545 554

pm: 14:00-17:15

Stirling

Detecting Fraud and Advising on Preventing Fraud	14 Feb
PAYE, Benefits & NI Update	21 Mar
VAT Update and Problem Areas	22 Jun
Finance Act 2011	14 Sep
Accountancy Update and Current Issues	29 Sep
The Reporting Requirements of Small Companies	19 Oct
Topical Tax Issues	16 Nov

TIMINGS AND VENUE

The Royal Hotel,
55 Henderson Street, Bridge of Allan,
Stirling FK9 4HG
Tel: 01786 832284

pm: 13:30-16:30

Sudbury

Delivering Service Excellence and Developing Client Advocacy	15 Jun
Detecting Fraud and Advising on Preventing Fraud	15 Sep

TIMINGS AND VENUE

The Bull Hotel,
Hall Street, Long Melford,
Sudbury, CO10 9JG
Tel: 01787 378 494

pm: 15:00-18:00

Tunbridge Wells

PAYE, Benefits & NI Update	14 Feb
Accountancy Update and Current Issues	28 Mar
Audit Update	18 Apr
Tax Planning for Family Companies	16 May
Inheritance Tax Planning including Trusts	20 Jun
Finance Act 2011	12 Sep
The Reporting Requirements of Small Companies	26 Sep
Detecting Fraud and Advising on Preventing Fraud	31 Oct
VAT Update and Problem Areas	14 Nov
Topical Tax Issues	28 Nov

TIMINGS AND VENUE

The Spa Hotel,
Mount Ephraim, Tunbridge Wells,
Kent TN4 8XJ
Tel: 01892 520331

pm: 14:00-17:15

Walsall

Topical Tax Issues	10 Feb [1] 15 Feb [2]
Planning to Retain the Wealth of the Elderly	10 Mar [1]
Personal Tax Planning: Current Issues	22 Mar [1]
Accountancy Update and Current Issues	11 Apr [1] 18 Apr [2]
Corporation Tax Refresher	18 May [1]
VAT Update and Problem Areas	7 Jun [1] 22 Jun [2]
The Reporting Requirements of Small Companies	16 Jun [1]

This programme will be extended to the second half of 2011 in July.

TIMINGS AND VENUE

[1] Walsall Football Club,
Banks's Stadium, Bescot Crescent,
Walsall WS1 4SA
Tel: 01922 651418

[2] Holiday Inn (Great Barr)
M6 J7, Chapel Lane, Great Barr,
Birmingham, B43 7BG
Tel: 0871 942 9009

pm: 14:00-17:00

Watford

PAYE, Benefits & NI Update	22 Feb
Accountancy Update and Current Issues	15 Mar
Audit Update	7 Apr
Inheritance Tax Planning including Trusts	16 May
Charities: Current Issues	23 May
Tax Planning for Family Companies	27 Jun
Finance Act 2011	20 Sep
The Reporting Requirements of Small Companies	5 Oct
Detecting Fraud and Advising on Preventing Fraud	18 Oct
Topical Tax Issues	21 Nov
VAT Update and Problem Areas	8 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

Personal Tax Planning: Current Issues	am pm	15 Feb 15 Feb
Audit Update	am pm	17 Mar 17 Mar
Business Valuations	pm	7 Apr
Accountancy Update and Current Issues	am pm	13 Apr 13 Apr
Business Tax: Problem Areas	am pm	10 May 10 May
Delivering Service Excellence and Developing Client Advocacy	pm	18 May
Capital Taxes - Recent Developments	am pm	29 Jun 29 Jun
Finance Act 2011	am pm	19 Sep 19 Sep
VAT Update and Problem Areas	am pm	6 Oct 6 Oct
Common Accounting Problems	am pm	3 Nov 3 Nov
Topical Tax Issues	am pm	16 Nov 16 Nov
Detecting Fraud and Advising on Preventing Fraud	pm	7 Dec

TIMINGS AND VENUE

Park Inn Birmingham West, M5 Jct 1
Birmingham Road, West Bromwich,
West Midlands B70 6RS
Tel: 0121 609 9988

am: 9:15-12:15 pm: 14:30-17:30

York

Accountancy Update and Current Issues	16 Mar
Audit Update	12 Apr
Charities: Current Issues	5 May
Tax Planning for Family Companies	17 May
Finance Act 2011	13 Sep
The Reporting Requirements of Small Companies	21 Sep
Delivering Service Excellence and Developing Client Advocacy	1 Nov
Topical Tax Issues	14 Nov
VAT Update and Problem Areas	7 Dec

TIMINGS AND VENUE

Yorkshire Air Museum, Halifax Way,
Elvington, York YO41 4AU
Tel: 01904 608595

pm: 14:00-17:15

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- venue maps
- a record of existing delegates names and the ability to add and remove delegates
- a record of courses booked - past and present.

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.

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.

David Bowes FTII
David is a partner with Bruce Sutherland & Co. His prior roles have included being Head of Valuations at a top fifteen Accountancy firm and, before that, a major Tax Consultancy. He was previously a senior member of Shares Valuation Division, He is also an experienced lecturer on valuation and writes articles on the subject for the professional press. He has appeared as an expert witness in Court. He is Honorary Secretary of the Society of Share & Business Valuers and the author of Tolley's Practical Share and Business Valuation.

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.

Christina Campbell ACA MAAT ATT
Christina qualified as a Chartered Accountant in 2002 with Newby Castleman in Leicester. Before joining the Mercia Tax Team in 2008 she worked as a financial controller in the lightweight automotive trade for four years.

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 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.

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.

Hannah Howe ACA
Hannah joined Mercia following seven years in practice with Deloitte, where she got her first taste of lecturing. As a member of our technical team she now lectures on a range of audit courses, as well as carrying out peer reviews.

Shan Hughes CTA ATT
Shan joined the tax team at Mercia from practice in 1999 and has lectured extensively throughout the UK on a variety of tax and personal skill professional development courses.

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.

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.

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.

Christine Taylor FCA
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.

Bill Telford BA FCA
Bill has recently set up Telford Financial Training but for the last ten years has been a partner in Baker Tilly where he was responsible for their national training programme. Bill is a very experienced trainer and prior to joining Baker Tilly in 2000 had spent many years on the CPD circuit, including a four year period with Mercia in the late 90s.

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.

Neil Warren
Neil started working in VAT in 1983 and he spent 14 years as an inspector in HM Customs and Excise before setting up his own tax and accounting practice in 1997. As well as VAT consultancy work, Neil also writes on VAT for most of the leading tax publications in the UK. Neil is also the author of Tolley's annual VAT Planning book and a member of the VAT Technical Committee of the ATT (Association of Taxation Technicians).

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.

Jeremy Williams ACA
Jeremy joined Mercia in 2000 as an audit lecturer, having qualified with KPMG in Leicester. As well as lecturing on a wide variety of audit and accounting topics, Jeremy is responsible for FSA-related products as well as providing technical support and peer review services.

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.

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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 are plus VAT, where applicable.

Booking is Easy…

Phone

Call a member of our enrolments team on 0116 258 1241

WWW

Online

Book online at www.mercia-group.co.uk using the following simple steps

- Click on the 'Courses' button 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 'Add to basket'

Email

Send your request to enrolments@mercia-group.co.uk

Post

Complete the relevant booking form on pages 85 – 88 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 85 – 88 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*	Delegate Names

*Courses that cost £90 or £120 are £120 when running in Northern Ireland

Sub total £

Plus VAT £

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 30 days credit terms apply

☐ I/We enclose a cheque for £ ________ made payable to Mercia Group Limited

Confirmation: An email will be sent confirming your booking.

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	Delegate Names

*Courses that cost £47.50 are £60 when running in Northern Ireland.

Total places [ ] @ £47.50* if 10 or more places booked £

Plus VAT £

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 ____________________

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Cardholder Address (inc. Postcode) ____________________

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☐ Please invoice my firm. I understand the usual 30 days credit terms apply

☐ I/We enclose a cheque for £ [ ] made payable to Mercia Group Limited

Confirmation: An email will be sent confirming your booking.

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.

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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 30 days credit terms apply

☐ I/We enclose a cheque for £ ________ made payable to Mercia Group Limited

Confirmation: An email will be sent confirming your booking.

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	Date
Client Care for Support Staff @ £185 per person		
Dealing with Difficult People @ £295 per person		
Delivering Service Excellence and Developing Client Advocacy @ £185 per person		
Developing Personal Resilience @ £295 per person		
Developing Your Personal Image and Reputation @ £185 per person		
Effective Business Writing Skills @ £185 per person		
Effective Networking Skills @ £185 per person		
Effective Presentation Skills @ £295 per person		
Improving Personal Productivity and Effectiveness @ £185 per person		
Motivational Leadership and Team Development @ £295 per person		
The People Manager's Toolkit @ £295 per person		
Turning Prospects Into Clients @ £295 per person		

Total number of places	£
Total of ____ places @ £185	£
Total of ____ places @ £295	£
Plus VAT	£
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	Delegate Names

Sub total £

Plus VAT £

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 30 days credit terms apply

☐ I/We enclose a cheque for £ __________ made payable to Mercia Group Limited

Confirmation: An email will be sent confirming your booking.

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.

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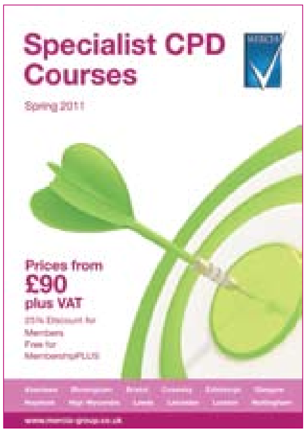
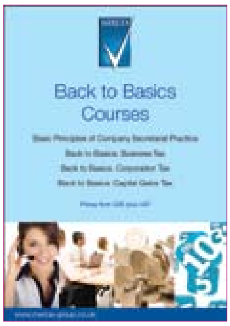
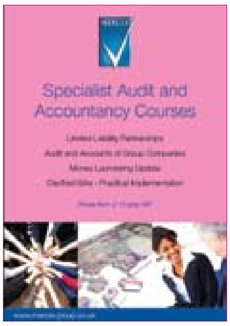
Specialist CPD Courses

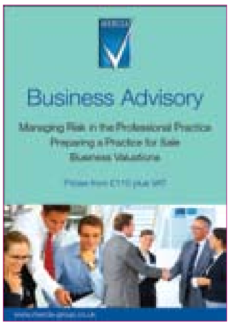


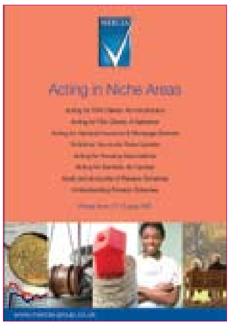
Our specialist course programmes are organised twice yearly in the spring and autumn. The programmes are planned in response to what is happening in the professional environment. There is no set pattern or regular programme as they address needs as and when they are identified.

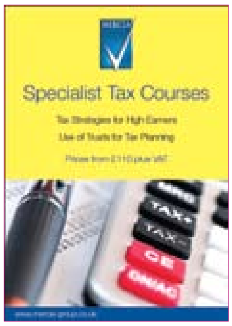
The programmes are designed to provide you with a selection of highly topical and specialist courses which will not usually be found in our local CPD course programmes. Our presenters are highly experienced and knowledgeable professionals and their delivery is always from a practical perspective. We 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.





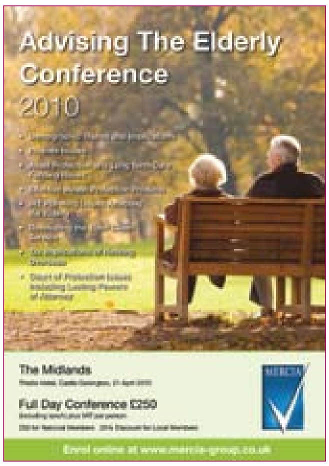


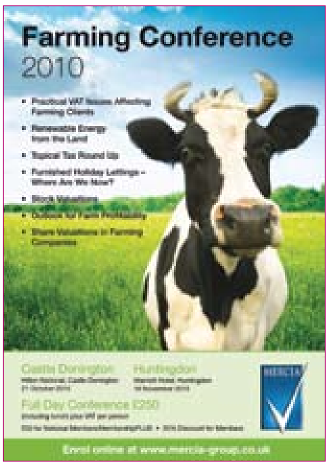




Specialist Conferences

Our specialist conferences 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 their clients' businesses. These are usually 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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