



Back to Basics Courses

Back to Basics: Trusts

Back to Basics: Inheritance Tax

Basic Principles of Company
Secretarial Practice

Prices from £85 plus VAT



£85 plus VAT per place

25% Discount for Local Members • Free for National Members

Back to Basics: Trusts

Speaker: Pat Nown, Mercia Group Ltd

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

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

WHO SHOULD ATTEND

This course is aimed at members of staff who require a basic understanding of trusts and how income tax and capital gains tax apply to trusts. This course will also be suitable for staff members who deal with the tax compliance of trusts but who have come to rely on computer software to get things right.

The course is not suitable for those new to the profession as participants require a working knowledge of income and capital gains tax.

Participants should bring a calculator.

CPD HOURS: 3

ICO, London

12 March 2010 9.30am to 12.30pm

Novotel, Nottingham

22 March 2010 9.30am to 12.30pm

Jurys Inn, Birmingham

30 March 2010 9.30am to 12.30pm

Adams Park Conference Centre, High Wycombe

2 November 2010 9.30am to 12.45pm

£85 plus VAT per place

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Back to Basics: Inheritance Tax

Speaker: Pat Nown, Mercia Group Ltd

OBJECTIVES

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

CONTENT

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

WHO SHOULD ATTEND

This course is aimed at members of staff who require a basic understanding of inheritance tax and who have little or no existing

knowledge in this area or who require a refresher of the basic rules. It will not normally be suitable for those who have covered this area as part of their professional examinations.

Participants should bring a calculator.

CPD HOURS: 3

ICO, London

12 March 2010 2.00pm to 5.00pm

Novotel, Nottingham

22 March 2010 2.00pm to 5.00pm

Jurys Inn, Birmingham

30 March 2010 2.00pm to 5.00pm

Adams Park Conference Centre, High Wycombe

2 November 2010 2.00pm to 5.15pm

£85 plus VAT per place

25% Discount for Local Members • Free for National Members

Basic Principles of Company Secretarial Practice

Speaker: Kris Taylor, Mercia Group Ltd

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

WHO SHOULD ATTEND

It is a useful introduction for any member of staff who is asked to deal with company secretarial work. It is an introductory course and so is not suitable for participants with extensive current knowledge of company secretarial work.

CPD HOURS: 3

Adams Park Conference Centre, High Wycombe

10 February 2010 9.30am to 12.45pm

Jurys Inn, Birmingham

12 February 2010 9.30am to 12.30pm

ICO, London

15 February 2010 2.00pm to 5.00pm

Booking Form

Complete the form below and return by fax, post or email

	DATE	NO. OF PLACES
Back to Basics: Trusts @ £85 per place	<input type="text"/>	<input type="text"/>
Back to Basics: Inheritance Tax @ £85 per place	<input type="text"/>	<input type="text"/>
Basic Principles of Company Secretarial Practice @ £85 per place	<input type="text"/>	<input type="text"/>

We are a national member firm - this form is to reserve our places on the courses as indicated. We understand we will not be invoiced for these places.

A total of places @ £85

Less 25% discount for local members £

Sub total £

VAT @ 17.5% £

TOTAL £

Contact name

Name of firm

Address

Postcode

Telephone

Email

Please invoice my firm. I understand the usual 28 days credit terms apply

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

I would like to receive more information about national/local membership

Confirmation: An invoice will be sent as confirmation of your booking (if appropriate).

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a £25 administration charge. All cancellations must be in writing.

Registered Office: 19 - 21 Christopher Street, London EC2A 2BS

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