

# *2020 Lecture Programme Reminder*

## *Tax programme*

**TL03/20 - Finance Bill/Act - including the annual Budget update - Giles Mooney**  
**Wednesday 18 March 2020 (14:00-17:00)**

### **AIMS AND OBJECTIVES**

Sajid Javid's first budget speech is almost certain to include some dramatic changes to the tax system in the UK. All of the major changes from the day and subsequent Finance Bill will be explained, in the context of the clients whose affairs will be affected. Identified planning areas and pitfalls will be covered. Other current developments in taxation as they affect practitioners and their clients may also be included.

### **CONTENT**

- Business income tax • Corporation tax • Employee tax and national insurance contributions
- Personal tax • Capital gains tax • Inheritance tax • Administration and miscellaneous

### **TARGET AUDIENCE**

Accountants in practice and business.

**TL04/20 - Trust and estate planning - Amanda Fisher**  
**Thursday 21 May 2020 (14:00-17:00)**

### **AIMS AND OBJECTIVES**

A refresher and update on trusts and estate planning, which will inspire delegates to see the benefits of trusts and why they are still a useful tax planning and practical tool for clients.

### **CONTENT**

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

### **TARGET AUDIENCE**

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

**TL05/20 - Personal tax update, including UK tax residence issues - Rebecca Benneyworth**  
**Tuesday 13 October 2020 (14:00-17:00)**

### **AIMS AND OBJECTIVES**

To bring delegates up to date with the latest changes in tax affecting private clients, and with measures in the pipeline which need some consideration in advance. It will include changes in the 2020 Finance Act and any other announcements made in the 12 months preceding the lecture.

***What's new for 2020?***

**ESSENTIALS CPD PROGRAMME**

See pages 7 and 8

The lecture will also refresh delegates on the rules about UK residence for tax purposes, in particular, highlighting the practical issues associated with advising clients on this thorny topic.

#### **CONTENT**

• Income tax change in Finance Act 2020 • Capital gains tax changes in Finance Act 2020 • Tax administration changes in Finance Act 2020 • Private residence disposals – the 2020 changes • Taxation of savings including pension savings – a quick refresher • Taxation of employees and directors – what's new? • Statutory Residence test: a refresher • Practical issues advising on residence

#### **TARGET AUDIENCE**

The lecture will be appropriate to staff and partners who have a good basic knowledge of personal tax issues and want to be updated on the latest developments.

### **TL06/20 – VAT update – Dean Wootten**

**Thursday 12 November 2020 (14:00-17:00)**

#### **AIMS AND OBJECTIVES**

The lecture will cover the key changes in VAT, together with the problem areas that practitioners may encounter when dealing with owner-managed clients.

#### **CONTENT**

• Registration issues • Flat rate • Output tax liability errors • Common input tax issues • Partial exemption issues • Dealing with international transactions correctly • Land and property • Making tax digital

#### **TARGET AUDIENCE**

Partners, managers and seniors who deal with owner-managed clients in their daily work.

## ***Practice programme***

### **PL03/20 – Legal update – Louise Dunford**

**Thursday 12 March 2020 (14:00-17:00)**

***This lecture is also part of the business programme.***

#### **AIMS AND OBJECTIVES**

To update practitioners dealing with SMEs on recent developments in company, business and employment law to enable them to provide added value to clients.

#### **CONTENT**

• Directors' duties, recent developments • Shareholders, dividends and minority protection • Restrictive covenants, TUPE • Purchase and sale of a business • Partnership update • Employment status – the latest • Minimum wage and holiday pay • Discrimination issues

#### **TARGET AUDIENCE**

Accountants providing assistance to SMEs, or working in small and medium sized companies.

### **PL04/20 – Good spreadsheet practice: Excel fundamentals – Simon Hurst**

**Tuesday 21 April 2020 (14:00-17:00)**

***This lecture is also part of the business programme.***

#### **AIMS AND OBJECTIVES**

Principle 3 of the ICAEW 20 Principles for good spreadsheet practice states 'Ensure that everyone involved in the creation or use of spreadsheets has an appropriate level of knowledge and competence'. This lecture seeks to ensure that attendees have at least the required level of knowledge and competence to cover the basic and general user categories within the ICAEW Spreadsheet Competency Framework.

#### **CONTENT**

• Excel anatomy – how everything fits together and how worksheets and workbooks should be set up to be as efficient and reliable as possible • Formula fundamentals – cell references, calculations, brackets, what the dollar signs do and why it's essential that you know • The most common Excel formula mistake and why avoiding it will save you time, effort and grief • The importance of Excel Tables

- Function fundamentals - what functions are and how to use them safely. Key functions SUM(), IF(), SUMIFS(), VLOOKUP()
- Effective formatting - cell formats, styles, number and date formats, conditional formats, charts and graphics
- Fundamental features - working with data, Pivot tables and data validation
- Is it right? Testing your spreadsheet and building in checks and controls
- Tips and shortcuts - keyboard and other shortcuts to work more efficiently and impress your colleagues

#### **TARGET AUDIENCE**

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

## **PL05/20 - Audit and financial reporting update - Jeremy Williams**

**Tuesday 19 May 2020 (14:00-17:00)**

#### **AIMS AND OBJECTIVES**

To update delegates on recent changes and current issues in audit and financial reporting (UK GAAP).

#### **CONTENT**

- The recent Triennial Review - early issues on adoption
- Distributable profits for companies
- The future of audit
- Recent changes to ISAs (UK) and other audit guidance

#### **TARGET AUDIENCE**

Qualified staff involved in accounts preparation and, where relevant, audit of UK SMEs. Including micro-entities and those who need a solid grasp of current accounting and auditing standards and guidance, and an appreciation of current issues arising from applying these standards in practice.

## **PL06/20 - Acting for healthcare professionals - Bob Trunchion**

**Tuesday 22 September 2020 (14:00-17:00)**

#### **AIMS AND OBJECTIVES**

This session will look at updating the accountant's knowledge on doctors and dentists. People fall into the trap of thinking that dealing with these two professions is being the same. While there are similarities, this is wrong - there are many differences which affect the advice required. In this rapidly changing niche market, it is essential that accountants are aware of all recent developments.

#### **CONTENT**

- The lecture will look at the two niches on a compare and contrast basis; it won't be an even time split between doctors and dentists
- The changing relationship between the GP or the dentist and the NHS must be considered. As the sector is under immense pressure, the government is injecting new money into it. So, the lecture will cover: Contract changes and consequences
- Successions and sales with goodwill implications
- Superannuation - an update
- Partnership deeds - what is needed
- Where are we with incorporation and other structures such as PCNs and federations etc?
- Specific operational tax problems - IR35, status, making tax digital, VAT, personal expenses
- Surgeries - capital gains and capital allowances

#### **TARGET AUDIENCE**

Accountants already acting for this type of client, who have at least a basic knowledge of the subject, and are looking for a technical update and refresher. It will also be suitable for those who would like an understanding of the problems encountered by this part of the healthcare sector.

# ***Commercial and business programme***

**CBL03/20 - Legal update - Louise Dunford**

**Thursday 12 March 2020 (14:00-17:00)**

***This lecture is also part of the practice programme.***

**CBL04/20 - Good spreadsheet practice: Excel fundamentals - Simon Hurst**

**Tuesday 21 April 2020 (14:00-17:00)**

***This lecture is also part of the practice programme.***

**CBL05/20 - Exploring shareholder value - Ian Cornelius**

**Thursday 14 May 2020 (14:00-17:00)**

## **AIMS AND OBJECTIVES**

From the eighties through to the noughties, the objective of creating and maximising value dominated the strategic landscape. But post financial crisis, a new definition of shareholder value is needed that incorporates sustainability, the needs of other stakeholders and takes a long-term perspective. This lecture will explore the continued relevance of shareholder value, and examine how it could be made fit for purpose for the next decade.

## **CONTENTS**

- A brief review of the history of the shareholder value maximisation objective; it's high points and low points
- An overview of the key financial metrics associated with the shareholder value movement including lessons from companies that have made them work
- The importance of taking people with you. How some companies have managed to establish a healthy shareholder value mentality within their organisations
- Incorporating a broader set of metrics. How the balanced scorecard and other tools can help establish a longer term and rounded view of shareholder value

## **TARGET AUDIENCE**

Anyone working within an organisation of any size that is trying to create a mentality of value creation and practitioners looking to give broad advice and guidance to their clients on the subject.

**CBL06/20 - Groups of companies - taxation and planning - Ros Martin**

**Thursday 1 October 2020 (14:00-17:00)**

## **AIMS AND OBJECTIVES**

Many practitioners will have to deal with groups of companies, even if these are just small groups of a single trading company with a non-trading holding company. The aim of the lecture is to consider what a group is, what the technical issues are for groups of companies and what the planning opportunities are. This is a complete refresher on this topic with a review of recent changes.

## **CONTENTS**

- What is a group and how does it vary for different purposes?
- The availability of group loss relief
- Capital gains tax for groups of companies including degrouping charges
- The SDLT implications for transferring assets between group companies
- Planning within groups to minimise tax and maximise reliefs

## **TARGET AUDIENCE**

Most general practitioners will deal with the affairs of groups of companies so this will act as a refresher for all those in practice and anyone in business who is working for a group.

# Programme 2020

## APPLICATION FORM

### *Tax*

PLACE(S)	REF	TITLE	DATE
	TL03/20	Finance Bill/Act - including the annual Budget update	Wed 18 March
	TL04/20	Trust and estate planning	Thur 21 May
	TL05/20	Personal tax update, including UK residence issues	Tues 13 October
	TL06/20	VAT update	Thur 12 November

### *Practice*

PLACE(S)	REF	TITLE	DATE
	PL03/20	Legal update *	Thur 12 March
	PL04/20	Good spreadsheet practice: Excel fundamentals *	Tues 21 April
	PL05/20	Audit and financial reporting update	Tues 19 May
	PL06/20	Acting for healthcare professionals	Tues 22 September

### *Commercial and business*

PLACE(S)	REF	TITLE	DATE
	CBL03/20	Legal update *	Thur 12 March
	CBL04/20	Good spreadsheet practice: Excel fundamentals *	Tues 21 April
	CBL05/20	Exploring shareholder value	Thur 14 May
	CBL06/20	Groups of companies – taxation and planning	Thur 1 October

\* Same lectures in the practice and business programmes

## VENUE

The Moat House Hotel, Lower Penkridge Road, Acton Trussell, Staffordshire ST17 0RJ, UK  
T: +44 (0)1785 712217 E: [info@moathouse.co.uk](mailto:info@moathouse.co.uk)

## CANCELLATIONS AND LATE BOOKINGS

- If you cannot attend you can transfer your place to another individual. Places can be transferred at any time up to and including the day of the event.
- Cancellations received less than 14 days before the event date will not be refunded. All cancellations must be made in writing.
- Transfers to a different lecture in the programme requires a minimum of one week's notice.
- If SSWSCA has to cancel the event, our liability in the event of cancellation is limited to a full refund of the fee.

## CHANGES TO THE PROGRAMME

We reserve the right to change the timing of the programme, the speakers, the date or the venue of the lectures advertised. The content of individual lectures may be subject to variation.

If you have any queries about the lectures please contact Linda Conway on +44 (0)121 270 8942 or email [linda.conway@icaew.com](mailto:linda.conway@icaew.com)

## FEE STRUCTURE

- Single SSWSCA lecture £63.00 + £12.60 VAT. Reduced rate for unemployed members, please contact [linda.conway@icaew.com](mailto:linda.conway@icaew.com)

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So joining instructions can be issued to each delegate can you please include all attendee names with either their membership number or their email address.

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Please add delegate initials to the lecture list to indicate who is attending which lecture		
FIRM/COMPANY:		
ADDRESS:		
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# 2020 dates overview

Course	Birmingham Conference and Events Centre	Crowne Plaza Birmingham City	Holiday Inn Wigston	Moat House Hotel Acton Trussell	Page Kirk LLP	Radisson Blu East Midlands Airport	Wolverhampton Science Park
<b>Tax</b>							
Practical implications of the Finance Act 2020	-	-	18 Jun	-	-	-	-
PAYE NIC update, including comprehensive review of off-payroll working	-	-	18 Jun	-	-	-	-
Tax planning for the family: marriage, separation & divorce	-	-	19 Oct	29 Sep	-	-	-
<b>Audit and Assurance</b>							
Audit and Assurance update (Spring)	-	-	-	-	-	1 Jul	-
Audit and Assurance update (Autumn)	-	-	-	-	-	5 Oct	-
<b>Accounting</b>							
Accounting/Financial reporting update (Spring)	-	-	-	-	-	1 Jul	-
Accounting/Financial reporting update (Autumn)	-	-	-	-	-	5 Oct	-
Charity Accounting and Governance update	-	-	-	-	-	9 Nov	-
Common accounting problems	-	-	-	-	-	9 Nov	-
IFRS update	 <b>Webinars</b>						
Transactions between a company and its directors							
Accounting for LLPs							
Accounting for academies							
Accounting and auditing for property companies							
Accounting and auditing for charities							
Accounting standards – the tax impact							
<b>Business Management</b>							
The power of communication – effective conversations	2 Jun	-	-	-	-	-	-
The power of communication – delivering impactful presentations	2 Jun	-	-	-	-	-	-
Implementing faster finance-led projects	-	-	-	-	-	-	26 Nov
Business partnering for the finance professional	25 Nov	-	-	-	-	-	-
Commercial acumen for finance professionals	25 Nov	-	-	-	-	-	-
The impact of digital technologies: Part 1	 <b>Webinars</b>						
The impact of digital technologies: Part 2							
<b>Practice Management</b>							
Creating a digital practice	-	15 Oct	-	-	-	-	-
<b>Wellbeing &amp; Personal Development</b>							
Do more in a day than you do in a week	-	-	-	-	29 Apr	-	-
Better people management	-	-	-	-	13 Nov	-	26 Nov
Persuasion and influencing skills	30 Sep	-	-	29 Sep	-	-	-
Unconscious bias: understanding and limiting its impact	-	-	-	13 Oct	-	-	-