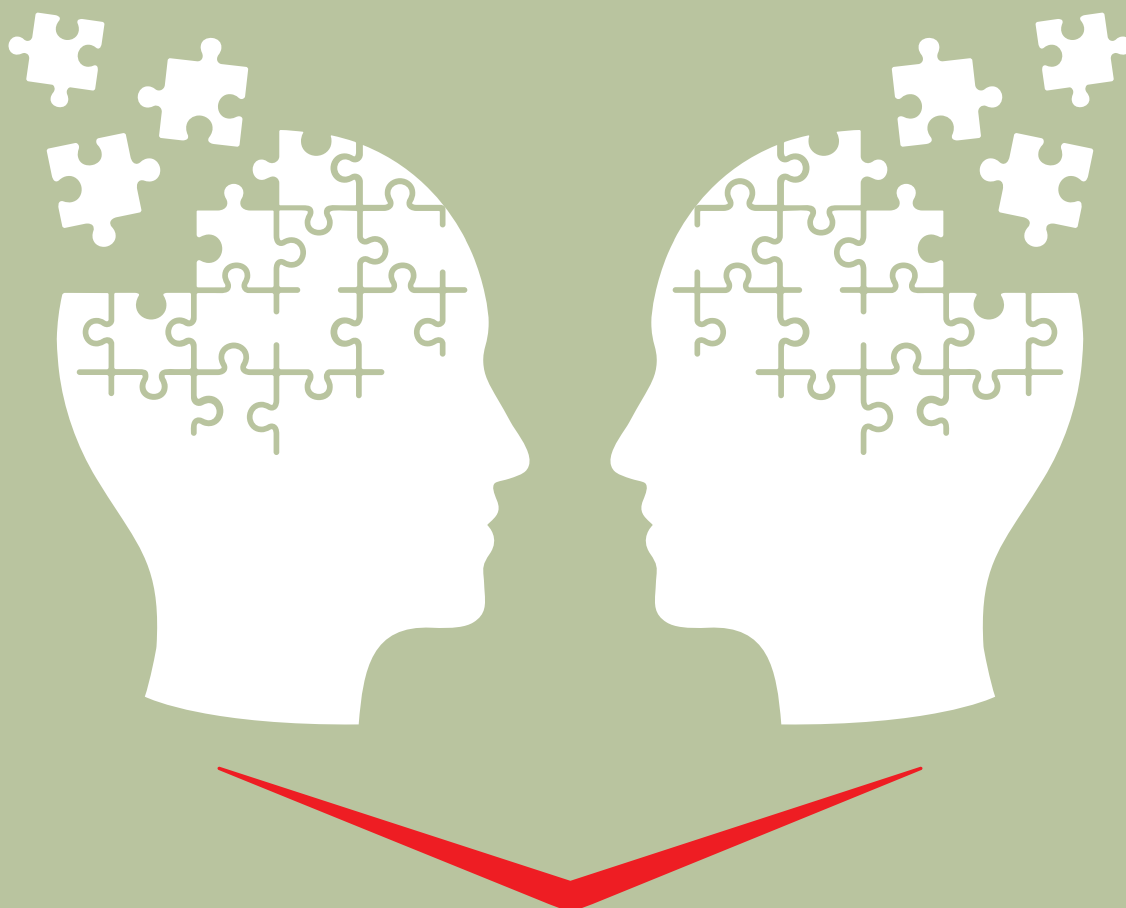




ICAEW
STAFFS, SALOP &
WOLVERHAMPTON



Lecture Programme
2019-2020

ICAEW

Staffs, Salop & Wolverhampton

Dear Colleague

2019-2020 LECTURE PROGRAMME

We are delighted to introduce our ICAEW Staffs, Salop and Wolverhampton (SSWSCA) 2019-2020 lecture programme. In order to make the lecture programme fall within the calendar year, this series only will cover 16 lectures from October 2019 to December 2020.

We will return to the 15 lectures for 2021 (some of which might be shared between the practice and business series) when it will run between February and December.

Lecture details can also be found at **events.icaew.com/**. Reminders will be sent to members in the West Midlands *What's On* monthly email.

Again, we are offering you the opportunity to make a block booking of the tax, practice or business lectures. If you book all six in the series you can take advantage of the series discount. The discount does not apply to mixing and matching between the tax, practice or business programmes.

Online booking is available please go to events.icaew.com/ and enter West Midlands in the Regions box.

PLEASE NOTE

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

If you have any queries about the lecture content or speakers please contact:

Tax lectures – Jenny Marks - jenny.marks@muras.co.uk

Practice lectures – James Eyre-Walker - jeyre-walker@howsons.com

Commercial and business lectures – Alison Ollier - alison.ollier@reassure.co.uk

Best Wishes

James Eyre-Walker

SSWSCA Courses & Conferences Chairman

Fees and booking conditions

FEE STRUCTURE

- Block booking of one place on all six tax, practice or business lectures £315 + VAT (block booking discount does not apply if mixing and matching between the tax, practice and business lectures).
- Individual lectures £63 + VAT.
- ICAEW Essentials CPD ticket price - see page 10
- Reduced rates for unemployed members, please contact Linda Conway +44 (0)121 270 8942 for details.
- The lecture programme is not subject to any further discount.

DAYS AND TIMES

See each individual lecture for the timing and day, as some differ to previous years.

BOOKINGS

- Online - To book your place online and pay by credit/debit card go to **events.icaew.com/** and enter West Midlands in the Regions box.
- Over the phone using a credit card - +44 (0)1908 248 159.
- Post - Complete the application form at the back of this booklet and return with a cheque to ICAEW West Midlands, PO Box 6083, Milton Keynes MK10 1PG, UK.
- Places will be allocated on a first-come-first-served basis. Priority will be given to those who have block booked.
- There is no guarantee that late bookings will be accepted.

VENUE

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

CANCELLATIONS AND LATE BOOKINGS

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

Tax programme

TL01/19 - Employment taxes, IR35 and PAYE update - Rebecca Benneyworth Tuesday 15 October 2019 (14:00-17:00)

AIMS AND OBJECTIVES

The lecture will update delegates on developments in the taxation of employment income and benefits in kind over the previous 18 months, and examine the current state of developments for the roll out of the off payroll working rules from April 2020.

CONTENT

• Changes in employment tax over the last 18 months • Update on benefits in kind and the tax treatment of expense payments • Off payroll working - implementation plans • What you need to be doing now for affected clients • Brief review - recent IR35 cases • Any other employment tax issues

TARGET AUDIENCE

Members in practice or business who have responsibility for this area or who want to update their knowledge on employment tax issues.

TL02/19 - Taxation of farming - Julie Butler Thursday 28 November 2019 (14:00-17:00)

AIMS AND OBJECTIVES

An update on farm taxation looking at a comprehensive range including capital taxes. With all the changes in farming, including the Agriculture Bill, the loss of subsidies, key tax tribunals like *Vigne* and *Graham*, the objective is to consider the tax implications.

CONTENT

• The need for strong legal agreements and understanding of tax implications • The grain silo case • The success of the *Vigne* and *Graham* cases • The tax impact of the Agriculture Bill and Brexit • The AIA leap to £1m for two years • The threat of the loss of APR to farming • The understanding of 100% v 50% BPR on partnerships

TARGET AUDIENCE

Accountants and tax advisers wanting to keep up to date with tax changes in farming. Accountants needing to understand the farming tax changes on their accounts. Likewise, tax advisers knowing what to look for in farm accounts.

TL03/20 - Finance Act - Giles Mooney Thursday 13 February 2020 (14:00-17:00)

AIMS AND OBJECTIVES

This lecture will familiarise participants with the provisions of the current Finance Bill/Act. All of the major changes in the Finance Act 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, depending on the significance and relevance of the Finance Bill/Act.

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. 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

PL01/19 - Charities - current issues - Phil Frost
Tuesday 1 October 2019 (14:00-17:00)

AIMS AND OBJECTIVES

The aim of this lecture is to keep all those involved in the preparation and scrutiny of charity accounts up to date with developments and common problem areas.

CONTENT

- Charities SORP (FRS 102) – practical accounting and disclosure issues faced by accountants and how to resolve them
- Update bulletins and changes to the Charities SORP
- Trustees' reports
- Scrutiny changes and reporting issues
- Recent auditing changes
- Common issues when auditing charities - a file reviewer's perspective
- Update on recent Charities Commission guidance and consultations
- Regulatory round-up

TARGET AUDIENCE

This lecture is aimed at all those involved in the preparation and scrutiny of charity accounts.

PL02/19 - Selling accountancy services - Gordon Gilchrist
Tuesday 3 December 2019 (14:00-17:00)

AIMS AND OBJECTIVES

To train fee earners how to sell the different services on offer to different types of clients. The consultative sales process is a systemised way of selling that can be followed and is highly effective. The aim is to increase the conversion rate from leads into clients and thereby increase the fees and profitability of a firm.

CONTENT

Too many accountants have been told accountants can't sell – completely untrue! Accountants can sell, very well indeed – it's just that sometimes they fall into the trap of trying to sell a service that, in fact, the customer does not want. This lecture will show you how to take advantage of a sales opportunity and convert that into a client. It will focus on the key skill in selling, will demonstrate the various ways there are of 'listening' and, as a result, understand what the clients do want. You will be taken through the five-step sales process and learn how firms can best present their case and close the deal.

TARGET AUDIENCE

Partners and senior fee earners.

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. The lecture is not hands-on, but the notes have been designed to provide step-by-step instructions for all the areas covered. This lecture is suitable for the levels 'Basic User to General User' under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework

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

CBL01/19 - Tax update for accountants in business - Ros Martin

Thursday 24 October 2019 (14:00-17:00)

AIMS AND OBJECTIVES

Tax is an ever-changing world with new legislation, HMRC guidance and case law. This lecture will provide a comprehensive update of all relevant changes and areas of interest with focus on business issues.

CONTENT

The following areas are likely to be covered but exact content will depend on issues which are current at the time of the session:

- The business as an employer
- Business income tax
- Corporation tax
- Property businesses
- VAT

TARGET AUDIENCE

Those who are working in business rather than practice but the content will be relevant to all who want a general update of current issues.

CBL02/19 - IFRS update for accountants in business - Guy Loveday

Thursday 14 November 2019 (14:00-17:00)

AIMS AND OBJECTIVES

Bringing all material leases on to the balance sheet is a big challenge. This lecture will look at the options available and will include worked examples. In addition, the lecture will focus on the areas where UK companies and their auditors are being criticised for their lack of compliance with IFRS.

CONTENT

- A close look at the full retrospective and modified retrospective approaches to transition to IFRS 16 on leases
- Latest Review Panel Annual Report concerning application of IFRS by UK companies

- Latest FRC Thematic Reviews – including smaller quoted and AIM companies
- FRC revised guidance on strategic reports including the new statement concerning the directors' duty to promote the success of the company
- An examination of Carillion plc – what went wrong?
- Latest IASB developments

TARGET AUDIENCE

Accountants responsible for preparing accounts under IFRS, for auditing accounts prepared under IFRS and accountants needing to convert from UK GAAP to IFRS.

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; its 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.

Essentials CPD 2019 is our cutting-edge core CPD programme designed by ICAEW and subject matter experts to keep you up to date and ahead of the competition. Delivered in Stafford, Essentials CPD combines industry-leading speakers with highly engaging content to bring you the latest practical guidance on the topical issues that matter most to you and your clients or stakeholders. Save, by taking full advantage of our multi-booking options.

OUR 2019 PROGRAMME INCLUDES:

Networking

8 Oct 2019 | 17:30 - 20:30 | Stafford

Identify what networking really is and why it is important, and learn practical tools to be able to network and to do it effectively and efficiently.

This course has no charge.

Techniques to bring financial information to life

20 Nov 2019 | 09:30 - 12:30 | Stafford

Learn simple but effective techniques to prepare and deliver financial information in reports, meetings and presentations.

Leading resilient teams

3 Dec 2019 | 17:30 - 20:30 | Stafford

Recognise signs of stress in others and implement strategies to develop your team's resilience, improve their well being and boost their performance.

This course has no charge.

Want more Essentials CPD? See the full programme by visiting icaew.com/essentialscpd

Do more in a day than you do in a week

12 Nov 2019 | 17:30 - 20:30 | Stafford

Explore some of the latest thinking and practical productivity hacks, leaving you with the capacity to clear your mind, define what's important to you and get in flow. **This course has no charge.**

Translating technical know-how into effective business partnering

20 Nov 2019 | 13:30 - 16:30 | Stafford

Move from a 'bean counting, information providing, transaction processing role' to a 'professional advisory and facilitating role' where finance staff are seen as joint problem solvers.

**DETAILS OF THE PROGRAMME FOR 2020
WILL BE AVAILABLE IN THE AUTUMN.**

MULTI-BOOKING OPTIONS

1 seminar	£100 + VAT
2-5 seminars	£75 + VAT
6-9 seminars	£65 + VAT
10-19 seminars	£60 + VAT
20+ seminars	Please contact the Events Information Team on the number opposite for the best price.

MULTI-BOOKING OPTIONS USAGE

Multi-booking options can be combined across the Essentials CPD programme and can be divided among multiple topics or people within an organisation or for an individual, making it an excellent way to fulfil individual and team core CPD requirements.

**TO BOOK OR FOR MORE INFORMATION,
CONTACT:**

ONLINE: icaew.com/sswcpd

EMAIL: events.information@icaew.com

PHONE: +44 (0)1908 248 159

Programme 2019-2020

APPLICATION FORM

Tax

PLACE(S)	REF	TITLE	DATE
	BLOCK	All six tax lectures	
	TL01/19	Employment taxes, IR35 and PAYE update	Tues 15 October 19
	TL02/19	Taxation of farming	Thur 28 November 19
	TL03/20	Finance Act	Thur 13 February 20
	TL04/20	Trust and estate planning	Thur 21 May 20
	TL05/20	Personal tax update, including UK residence issues	Tues 13 October 20
	TL06/20	VAT update	Thur 12 November 20

Practice

PLACE(S)	REF	TITLE	DATE
	BLOCK	All six practice lectures	
	PL01/19	Charities – current issues	Tues 1 October 19
	PL02/19	Selling accountancy services	Tues 3 December 19
	PL03/20	Legal update *	Thur 12 March 20
	PL04/20	Good spreadsheet practice: Excel fundamentals *	Tues 21 April 20
	PL05/20	Audit and financial reporting update	Tues 19 May 20
	PL06/20	Acting for healthcare professionals	Tues 22 September 20

Commercial and business

PLACE(S)	REF	TITLE	DATE
	BLOCK	All six commercial and business lectures	
	CBL01/19	Tax update for accountants in business	Thur 24 October 19
	CBL02/19	IFRS update for accountants in business	Thur 14 November 19
	CBL03/20	Legal update *	Thur 12 March 20
	CBL04/20	Good spreadsheet practice: Excel fundamentals *	Tues 21 April 20
	CBL05/20	Exploring shareholder value	Thur 14 May 20
	CBL06/20	Groups of companies – taxation and planning	Thur 1 October 20

* Same lectures in the practice and business programmes

FEE STRUCTURE

- SSWSCA lecture block booking £315 + £63.00 VAT - one place on all six tax, practice or business series (mixing and matching of any of the three series of lectures is not allowed)
- Single SSWSCA lecture £63.00 + £12.60 VAT

To book your place go to **events.icaew.com/** and enter West Midlands in the regions box.

You can also email **districtsocietyaccounts@icaew.com** or call our Events Information Team on +44 (0)1908 248 159 to pay by credit card.

Alternatively, complete both sides of this form and return it to:

ICAEW West Midlands
P O Box 6083
Milton Keynes MK10 1PG, UK

Please include your telephone number and e-mail address so you can be contacted in case of a late problem.

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.

NAME OF CONTACT:		
NAME(S) OF DELEGATE(S):		MEMBERSHIP NO: (If applicable) or email address
Please add delegate initials to the lecture list to indicate who is attending which lecture		
FIRM/COMPANY:		
ADDRESS:		
TELEPHONE:		
EMAIL:		

PAYMENT BY CHEQUE

I enclose a cheque for £ + £ VAT at 20% payable to **Staffs Chartac**
Once payment is received a VAT receipt/confirmation of booking will be issued.

Please check and update your communication preferences at icaew.com/preference

1. The protection of personal privacy is an important concern to ICAEW. Any personal data collected will be treated in accordance with current data protection legislation.
2. We will use your personal data to deliver your event services (webinars, conferences, training and dinners) incorporating; administration (pre, post and during the event), communications, invoicing and payment, delegate lists (we are unable to remove you from delegate lists once these have gone to print), post-event feedback, quality, research and voting.
3. In order to meet our event obligations to you we may share relevant personal data with presenters, venues, trainers, organisers, print houses, finance partners, connected communities, faculties, committees, district societies and external delivery partners.
4. For more information about our data protection policy please go to icaew.com/dataprotection