SESCA

2024 CPD PROGRAMME

Accounting, Taxation and Business Courses

Quality, verifiable, flexible accountancy and business training

Your key to professional knowledge

2024 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
2024	Ethics: Practising Professionalism	J.Williams	67	W	ANY	ET01A4
2024	Ethics: Ethical Decision Making	J.Williams	68	W	ANY	ET02A4
2024	Why Power Query is the Most Important Excel Development Ever – Even if You Don't Work with Data!	S.Hurst	75	W	ANY	EX01A4
2024	Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	76	W	ANY	EX02A4
2024	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	77	W	ANY	EX03A4
2024	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	78	W	ANY	EX04A4
2024	More Power to Your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	79	W	ANY	EX05A4
2024	Essential Word Productivity Skills and Techniques for Accountants	S.Hurst	80	W	ANY	WD01A4
2024	New Employee Word & Excel Productivity Courses Bundle	S.Hurst	81	W	ANY	WE02A4
28 Feb	Hot Topics in VAT	N.Owen	34	O	AM	FE28A4
28 Feb	Complete Guide to Tax Planning for Small Businesses	M.Ward	11	O	PM	FE28B4
05 Mar	PAYE and National Insurance Update	A.Durrant	12	O	AM	MA05A4
05 Mar	A Practical Approach to Forms P11D	A.Durrant	13	O	PM	MA05B4
06 Mar	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	51	O	AM	MA06A4
06 Mar	Pensions - What the Accountant Needs to Know	M.Ingles	25	O	PM	MA06B4
07 Mar	Hot Topics in International Tax	J.Mindell	21	O	AM	MA07A4
12 Mar	Introduction to Housing Association Accounts and Audit	P.Herbert	60	O	AM	MA12A4
12 Mar	Capital Gains Tax for Owner Managed Businesses	M.Ward	28	O	PM	MA12B4
13 Mar	A Practical Approach to Forms P11D	A.Durrant	13	O	AM	MA13A4
13 Mar	PAYE and National Insurance Update	A.Durrant	12	O	PM	MA13B4
14 Mar	Companies Act Refresher	J.Selwood	54	O	AM	MA14A4
14 Mar	Introduction to Pension Scheme Accounts	P.Herbert	58	O	PM	MA14B4
19 Mar	Introduction to Charity Accounts	P.Herbert	57	O	AM	MA19A4
20 Mar	SRA Accounts Rules Annual Update	J.Taylor	53	O	AM	MA20A4
20 Mar	Businesses in Trouble - Helping Your Client in Times of Crisis	P.Ridgway	71	O	PM	MA20B4
21 Mar	Complete Guide to International VAT Issues	N.Owen	35	O	DAY	MA21D4
17 Apr	Tales of the Unexpected: VAT Case Studies with Outcomes Good and Bad	N.Owen	39	O	AM	AP17A4
17 Apr	HMRC Investigations	J.Mindell	19	O	PM	AP17B4
18 Apr	Employment and Business Law Update	L.Dunford	63	O	AM	AP18A4
18 Apr	Topical Tax Issues for Owner Managed Businesses	M.Ward	10	O	PM	AP18B4
23 Apr	Corporation Tax Update	G.Mooney	18	O	AM	AP23A4
24 Apr	Complete Guide to Acting for Small Businesses	M.Ingles	24	O	AM	AP24A4
24 Apr	Annual IFRS Update	G.Loveday	47	O	PM	AP24B4
25 Apr	Complete Guide to VAT and Property Transactions	N.Owen	37	O	AM	AP25A4
25 Apr	Effective Narrative Reporting	V.Steward	48	O	PM	AP25B4
01 May	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	50	O	AM	MY01A4
02 May	The Accountant on the Farm - A Comprehensive Review	D.Missen & G.Pilcher	20	O	AM	MY02A4
02 May	Tax Planning in Difficult Economic Times	G.Mooney	17	O	PM	MY02B4
08 May	Housing Associations Accounting and Audit Update	V.Steward	61	O	AM	MY08A4
08 May	VAT Pitfalls and Solutions	D.Wootten	33	O	PM	MY08B4
09 May	Taxation Update	G.Mooney	7	O	AM	MY09A4
09 May	Audit and Accounting Update	G.Loveday	43	O	PM	MY09B4
09 May	Accounting and Financial Reporting Update	G.Loveday	44	O	AM	MY09C4
09 May	Taxation Update	G.Mooney	7	O	PM	MY09D4
14 May	A Practical Tax Brush Up for Returners	R.Benneyworth	9	O	AM	MY14A4
14 May	A Practical Accounting Update for Returners	K.McCaffrey	46	O	PM	MY14B4
14 May	Capital Taxes Update	M.Ward	29	O	AM	MY14C4
20 May	Taxation Update for Accountants in Business	M.Ingles	8	O	AM	MY20A4
20 May	Accounting Update for Accountants in Business	G.Loveday	45	O	PM	MY20B4
21 May	Accounting Update for Accountants in Business	G.Loveday	45	D	AM	MY21A4
21 May	Taxation Update for Accountants in Business	M.Ingles	8	D	PM	MY21B4
22 May	Trusts: Update and Planning Using Client Case Studies	A.Fisher	30	O	AM	MY22A4

2024 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
22 May	Essential Guide to Share and Business Valuations	D.Bowes	69	O	PM	MY22B4
23 May	Complete Guide to Tax and the Family	M.Ward	23	O	AM	MY23A4
23 May	Complete Guide to Essential VAT for Charities	N.Owen	36	O	PM	MY23B4
23 May	Topical Issues in Insolvency •	Various	87	D	DAY	MY23D4
04 Jun	Payroll Services for Clients: Practical Problems	A.Durrant	14	O	AM	JN04A4
04 Jun	Complete Guide to VAT in the Construction Industry	N.Owen	38	O	PM	JN04B4
05 Jun	Taxation Update	M.Ward	7	O	AM	JN05A4
05 Jun	Accounting and Financial Reporting Update	G.Loveday	44	O	PM	JN05B4
05 Jun	Audit and Accounting Update	G.Loveday	43	O	AM	JN05C4
05 Jun	Taxation Update	M.Ward	7	O	PM	JN05D4
06 Jun	Guarding the Ledger - Cyber Security and Data Protection	S.Hill	74	O	AM	JN06A4
06 Jun	Complete Guide to Partial Exemption and the Capital Goods Scheme	N.Owen	40	O	PM	JN06B4
10 Jun	Accounting and Financial Reporting Update	G.Loveday	44	OM	AM	JN10A4
10 Jun	Taxation Update	M.Ward	7	OM	PM	JN10B4
11 Jun	Taxation Update	G.Mooney	7	P	AM	JN11A4
11 Jun	Audit and Accounting Update	G.Loveday	43	P	PM	JN11B4
12 Jun	Charity Trusteeship: Getting it Right for Finance Professionals	C.D'cruz	66	O	AM	JN12A4
13 Jun	Taxation Update	M.Ward	7	O	AM	JN13A4
13 Jun	Audit and Accounting Update	G.Loveday	43	O	PM	JN13B4
13 Jun	Accounting and Financial Reporting Update	G.Loveday	44	O	AM	JN13C4
13 Jun	Taxation Update	M.Ward	7	O	PM	JN13D4
14 Jun	How to be an Effective Networker	T.Trevett	72	O	AM	JN14A4
19-21 Jun	Tax Conference 2024 •	Various	87	KU	C	JN19C4
21 Jun	Tax Conference 2024 - Topical Tax Tips and Pitfalls *	G.Mooney	41	KU	AM	JN21A4
25 Jun	Accounting Update for Accountants in Business	G.Loveday	45	P	AM	JN25A4
25 Jun	Taxation Update for Accountants in Business	M.Ingles	8	P	PM	JN25B4
26 Jun	Accounting Update for Accountants in Business	G.Loveday	45	CB	AM	JN26A4
26 Jun	Taxation Update for Accountants in Business	M.Ingles	8	CB	PM	JN26B4
27 Jun	Accounting Update for Accountants in Business	G.Loveday	45	O	AM	JN27A4
27 Jun	Taxation Update for Accountants in Business	M.Ingles	8	O	PM	JN27B4
02 Jul	Complete Guide to Acting for Small Businesses	M.Ingles	24	O	AM	JY02A4
02 Jul	Accounting for and Auditing Academy Schools	P.Herbert	52	O	PM	JY02B4
03 Jul	Complete Guide to Tax Planning for Small Businesses	M.Ward	11	O	AM	JY03A4
03 Jul	Construction Industry Tax Refresher	T.Palmer	31	O	PM	JY03B4
04 Jul	Dealing with Common Property Transactions	M.Ward	32	O	AM	JY04A4
10 Sep	Payroll Services for Clients - Practical Problems	A.Durrant	14	O	AM	SE10A4
11 Sep	Capital Gains Tax and Inheritance Tax Refresher	N.May	27	O	AM	SE11A4
12 Sep	Acting for Doctors Update	A.Leal	26	O	AM	SE12A4
12 Sep	Hot Topics in VAT	N.Owen	34	O	PM	SE12B4
12-13 Sep	Insolvency Conference 2024 •	Various	87	RU	C	SE12C4
17 Sep	A Practical Accounting Update for Returners	K.McCaffrey	46	O	AM	SE17A4
17 Sep	A Practical Tax Brush Up for Returners	R.Benneyworth	9	O	PM	SE17B4
18 Sep	Essential Guide to Share and Business Valuations	D.Bowes	69	O	AM	SE18A4
18 Sep	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	51	O	PM	SE18B4
19 Sep	Topical Tax Issues for Owner Managed Businesses	M.Ward	10	O	AM	SE19A4
19 Sep	Trusts: Update and Planning Using Client Case Studies	A.Fisher	30	O	PM	SE19B4
24 Sep	Annual IFRS Update	G.Loveday	47	O	AM	SE24A4
25 Sep	Subjectivity and Scepticism - The Thinking Auditor's Guide	R.Tiffin	55	O	AM	SE25A4
25 Sep	Tales of the Unexpected: VAT Case Studies with Outcomes Good and Bad	N.Owen	39	O	PM	SE25B4
25 Sep	Tax Planning in Difficult Economic Times	G.Mooney	17	O	AM	SE25C4
26 Sep	Charities Legal Update	C.D'cruz	65	O	AM	SE26A4
26 Sep	Charities Update	J.Rowe	64	O	PM	SE26B4
02 Oct	Pensions - What the Accountant Needs to Know	M.Ingles	25	O	AM	OC02A4
02 Oct	A Practical Approach to Forms P11D	A.Durrant	13	O	PM	OC02B4

2024 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
03 Oct	A Practical Introduction to Payroll	A.Durrant	15	O	AM	OC03A4
03 Oct	Capital Taxes Update	M.Ward	29	O	PM	OC03B4
08 Oct	Corporation Tax Update	G.Mooney	18	O	AM	OC08A4
08 Oct	Construction Industry Tax Refresher	T.Palmer	31	O	PM	OC08B4
09 Oct	How to be Better Remembered, Referred and Recommended	M.Lee	70	O	AM	OC09A4
09 Oct	Employment and Business Law Update	L.Dunford	63	O	PM	OC09B4
10 Oct	Essential Guide to Tax Issues on Buying, Selling and Closing Down Businesses	K.Read	22	O	AM	OC10A4
10 Oct	Topical Audit Problems and Solutions	J.Selwood	56	O	PM	OC10B4
10 Oct	Topical Issues in Insolvency ●	Various	87	D	DAY	OC10D4
11 Oct	Making Tax Digital Update	R.Benneyworth	16	O	AM	OC11A4
15 Oct	Charities Update	J.Rowe	64	O	AM	OC15A4
15 Oct	Charities Legal Update	C.D'cruz	65	O	PM	OC15B4
16 Oct	Problems Commonly Encountered Under IFRS and FRS 102 - and Solutions!	G.Loveday	49	O	AM	OC16A4
16 Oct	Complete Guide to VAT and Property Transactions	N.Owen	37	O	PM	OC16B4
17 Oct	Complete Guide to International VAT Issues	N.Owen	35	O	DAY	OC17D4
18 Oct	Pension Accounting, Audit and Regulatory Update	V.Steward	59	O	AM	OC18A4
05 Nov	Complete Guide to VAT in the Construction Industry	N.Owen	38	O	AM	NO05A4
05 Nov	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	50	O	PM	NO05B4
06 Nov	Capital Gains Tax for Owner Managed Businesses	M.Ward	28	O	AM	NO06A4
06 Nov	Complete Guide to Tax and the Family	M.Ward	23	O	PM	NO06B4
07 Nov	Making Tax Digital Update	R.Benneyworth	16	O	AM	NO07A4
07 Nov	Dealing with Common Property Transactions	M.Ward	32	O	PM	NO07B4
12 Nov	VAT Pitfalls and Solutions	D.Wootten	33	O	AM	NO12A4
12 Nov	Improve Your Communication Skills	T.Trevett	73	O	PM	NO12B4
14 Nov	Taxation Update	G.Mooney	7	O	AM	NO14A4
14 Nov	Audit and Accounting Update	G.Loveday	43	O	PM	NO14B4
14 Nov	Accounting and Financial Reporting Update	G.Loveday	44	O	AM	NO14C4
14 Nov	Taxation Update	G.Mooney	7	O	PM	NO14D4
15 Nov	Effective Narrative Reporting	V.Steward	48	O	AM	NO15A4
19 Nov	Audit and Accounting Update	G.Loveday	43	OM	AM	NO19A4
19 Nov	Taxation Update	M.Ward	7	OM	PM	NO19B4
20 Nov	Accounting Update for Accountants in Business	G.Loveday	45	CB	AM	NO20A4
20 Nov	Taxation Update for Accountants in Business	M.Ingles	8	CB	PM	NO20B4
21 Nov	Accounting Update for Accountants in Business	G.Loveday	45	P	AM	NO21A4
21 Nov	Taxation Update for Accountants in Business	M.Ingles	8	P	PM	NO21B4
22 Nov	Accounting Update for Accountants in Business	G.Loveday	45	O	AM	NO22A4
22 Nov	Taxation Update for Accountants in Business	M.Ingles	8	O	PM	NO22B4
26 Nov	Taxation Update	M.Ward	7	O	AM	NO26A4
26 Nov	Accounting and Financial Reporting Update	G.Loveday	44	O	PM	NO26B4
26 Nov	Audit and Accounting Update	G.Loveday	43	O	AM	NO26C4
26 Nov	Taxation Update	M.Ward	7	O	PM	NO26D4
27 Nov	Taxation Update for Accountants in Business	M.Ingles	8	D	AM	NO27A4
27 Nov	Accounting Update for Accountants in Business	G.Loveday	45	D	PM	NO27B4
28 Nov	Taxation Update for Accountants in Business	M.Ingles	8	O	AM	NO28A4
28 Nov	Accounting Update for Accountants in Business	G.Loveday	45	O	PM	NO28B4
03 Dec	Accounting and Financial Reporting Update	G.Loveday	44	P	AM	DE03A4
03 Dec	Taxation Update	N.May	7	P	PM	DE03B4
05 Dec	Taxation Update	N.May	7	O	AM	DE05A4
05 Dec	Audit and Accounting Update	G.Loveday	43	O	PM	DE05B4
05 Dec	Accounting and Financial Reporting Update	G.Loveday	44	O	AM	DE05C4
05 Dec	Taxation Update	N.May	7	O	PM	DE05D4

KEY Time: AM=09:30-12:30, PM=13:30-16:30, *=09:15-12:30 DAY = Timings vary – see individual course information, C=Conference – see individual conference information. For key to venues see page 87. ● = Not available on flexiticket

2024 SESCA CPD PROGRAMME

Prices held again for 2024

Fees

	Fee	VAT	Total
5 place Flexiticket	**£328.00**	**£65.60**	**£393.60**
12 place Flexiticket	**£756.00**	**£151.20**	**£907.20**
25 place Maxiticket	**£1500.00**	**£300.00**	**£1800.00**
Individual course (half day)	**£100.00**	**£20.00**	**£120.00**
Whole day course (p35)	**£175.00**	**£35.00**	**£210.00**
'Brush-ups' with discount (p9 & 46)	**£50.00**	**£10.00**	**£60.00**
Ethics: Practising Professionalism (p67) (Or one place on the Flexiticket if also attending Ethics: Ethical Decision-Making course)	**£30.00**	**£6.00**	**£36.00**
Ethics: Ethical Decision-Making (p68) (Or one place on the Flexiticket if also attending Ethics: Practising Professionalism course)	**£40.00**	**£8.00**	**£48.00**
New Employee Word & Excel Productivity Courses Bundle (p81)	**£100.00**	**£20.00**	**£120.00**
Charities courses with discount (p64 & 65 –both courses)	**£100.00**	**£20.00**	**£120.00**
Tax Conference	**£375.00**	**£75.00**	**£450.00**
Tax Conference early booking discount (booked and paid for **by 30/04/24**)	**£355.00**	**£71.00**	**£426.00**
Insolvency Conference	**£325.00**	**£65.00**	**£390.00**
Insolvency Conference early booking discount (booked and paid for **by 31/05/24**)	**£310.00**	**£62.00**	**£372.00**
Topical Issues in Insolvency Seminar (Either May or Oct)	**£190.00**	**£38.00**	**£228.00**
Topical Issues in Insolvency Seminars (Both May & Oct)	**£330.00**	**£66.00**	**£396.00**

To book please email courses@sesca.co.uk, visit the website www.sesca.co.uk or call 01737 223999.
All bookings must be accompanied by payment. A VAT invoice will be issued with your confirmation email.

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Sort code: 20-23-97
Please quote company name when paying by BACS

Return address:
SESCA Ltd,
2B Chart House, Effingham Road,
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SESCA

THE FLEXITICKET EXPLAINED

The Flexiticket offers one of the best value for money CPD discount schemes. Places are transferable and may be used by any number of individuals from different organisations, allowing smaller and sole practitioners and members in business to ‘club together’.

- Tickets are valid for up to 13 months, for example if the first course booked takes place in March 2024 your ticket will start on 1 March 2024 and will expire on 31 March 2025.
- Places must be used on courses which take place within the validity period of the ticket.
- All courses are verifiable. Individual CPD reports are sent each January, but reports may be requested at any time.
- Face-to-face courses are held at Dorking, Maidstone, Portsmouth and Bracknell.
- All live online courses are provided using Zoom.
- The Flexiticket is valid on all half day and whole day courses.
- Book and reserve places at any time. You will not be invoiced until the 1st of the month in which the first course you wish to attend takes place, allowing you to book your places well in advance.
- The places can be used by any number of individuals on any number of courses totalling the number of places on the Flexiticket.
- A course place must be cancelled by email, and acknowledged by us, at least two clear working days before the course date to enable you to use the place on another course within the validity period of your ticket. Alternatively, you may request the documentation. If you choose to be sent the documentation this will constitute use of one place on your ticket. If no prior notice of cancellation is received and you do not attend, you will be sent the course notes using one place on your ticket.
- No refunds are made on places not used.
- Ring or email at any time to find out how many places you have left on your Flexiticket if you have lost track.
- Apply via our website, by post, email or phone for a Flexiticket or course place. You will receive an email confirming your Flexiticket bookings and a VAT invoice.
- You will be emailed the Zoom link and course materials, in PDF format, two days before each live online course date.
- You will be emailed a reminder of all venue-based courses one week before the course date. Course documentation will be provided at the venue.
- For more information on any course or the Flexiticket please visit our website www.sesca.co.uk or call 01737 223999 or email courses@sesca.co.uk
- Full terms and conditions can be found at www.sesca.co.uk.

TAXATION COURSES PROGRAMME

See also 'Specialist' section (pages 62-81) for specialist topics with taxation content

HALF YEARLY TAXATION UPDATES

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both.

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: Specific topics will be set nearer the time in order to ensure up to the minute coverage. Previous topics have included:

- Finance Act/Bill
- Topical tax administration and investigation points such as MTD and IR35
- Recent tax tribunal and court cases
- HMRC promulgations
- Developments in VAT
- Planning and practical points arising in the period

Speakers: (see table below)

Giles Mooney BSc (Hons) FCA CTA, Managing Director of PTP Ltd, entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Nigel May LLB (Hons) CTA TEP, has been a tax partner with a new firm Gravita since October 2022, having previous been a tax partner at MacIntyre Hudson. He lectures on a wide range of direct tax issues.

Mark Ward LLB CTA is a very experienced lecturer. He has an ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style.

Dates, venues and timing:

Set out below are the dates and venues for all the updates. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees). The timing for all courses is:

AM	Registration: **09:00**	Course starts: **09:30**	Break/Coffee: **11:00**	Course ends: **12:30**
PM	Registration: **13:00**	Course starts: **13:30**	Break/Coffee: **15:00**	Course ends: **16:30**

South East	Time	Speaker		
Monday 10 June	PM	MW	Orida Hotel, Maidstone	Code: JN10B4
Tuesday 19 November	PM	MW	Orida Hotel, Maidstone	Code: NO19B4
Southern	**Time**	**Speaker**		
Tuesday 11 June	AM	GM	Portsmouth Marriott Hotel	Code: JN11A4
Tuesday 3 December	PM	NM	Portsmouth Marriott Hotel	Code: DE03B4
Live Online	**Time**	**Speaker**		
Thursday 9 May	AM	GM	Live online using Zoom	Code: MY09A4
Thursday 9 May	PM	GM	Live online using Zoom	Code: MY09D4
Wednesday 5 June	AM	MW	Live online using Zoom	Code: JN05A4
Wednesday 5 June	PM	MW	Live online using Zoom	Code: JN05D4
Thursday 13 June	AM	MW	Live online using Zoom	Code: JN13A4
Thursday 13 June	PM	MW	Live online using Zoom	Code: JN13D4
Thursday 14 November	AM	GM	Live online using Zoom	Code: NO14A4
Thursday 14 November	PM	GM	Live online using Zoom	Code: NO14D4
Tuesday 26 November	AM	MW	Live online using Zoom	Code: NO26A4
Tuesday 26 November	PM	MW	Live online using Zoom	Code: NO26D4
Thursday 5 December	AM	NM	Live online using Zoom	Code: DE05A4
Thursday 5 December	PM	NM	Live online using Zoom	Code: DE05D4

HALF YEARLY TAXATION UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Martyn Ingles BSc FCA CTA

Objectives: All Chartered Accountants are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The emphasis is on recent developments in company and employee taxation as well as relevant VAT changes. Comprehensive notes are provided for future reference. The courses are run half yearly face-to-face, as well as being available live online.

Who should attend: Those working in industry and commerce who need to keep abreast of current tax developments.

Topics:

- Budget and Finance Act changes
- Current developments in company taxation
- Topical employee taxation issues
- Value Added Tax developments
- HMRC pronouncements
- Recent tax cases

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Dates, venues and timing: Set out below are the dates and venues for all the updates. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees). There is a similar accounting update (see page 45 for details). The timing for all courses is as follows:

AM	Registration: **09:00**	Course starts: **09:30**	Break/Coffee: **11:00**	Course ends: **12:30**
PM	Registration: **13:00**	Course starts: **13:30**	Break/Coffee: **15:00**	Course ends: **16:30**

South East			
Tuesday 21 May	PM	Denbies Wine Estate, Dorking	Code: MY21B4
Wednesday 27 November	AM	Denbies Wine Estate, Dorking	Code: NO27A4
Southern			
Tuesday 25 June	PM	Portsmouth Marriott Hotel	Code: JN25B4
Thursday 21 November	PM	Portsmouth Marriott Hotel	Code: NO21B4
Thames			
Wednesday 26 June	PM	Coppid Beech Hotel, Binfield, Bracknell	Code: JN26B4
Wednesday 20 November	PM	Coppid Beech Hotel, Binfield, Bracknell	Code: NO20B4
Live Online			
Monday 20 May	AM	Live online using Zoom	Code: MY20A4
Thursday 27 June	PM	Live online using Zoom	Code: JN27B4
Friday 22 November	PM	Live online using Zoom	Code: NO22B4
Thursday 28 November	AM	Live online using Zoom	Code: NO28A4

A PRACTICAL TAX BRUSH-UP FOR RETURNERS

Speaker: Rebecca Benneyworth MBE BSc FCA

Objectives: This annual course is designed for accountants returning to the professional workplace after a career break, providing an overview of the principles of PAYE and NIC, VAT and business and corporation tax. This is not a detailed technical course. It will give the delegates the confidence required to say "I can do that" when returning to the workplace. The basic principles of the three topics will be covered, most of which will already have been learnt and understood by delegates, but which may not have been used for some time. The course will cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, and "old stagers", who may be dealing with payroll, VAT returns and corporation tax computation work and who need to be brought up to date.

Topics:

- Update on tax rates & bands, NI rates and thresholds & minimum wage rates 2024/25
- A quick review of PAYE and NIC procedures for payroll; correcting errors; RTI penalties
- Statutory payments update – SSP, SMP, SAP, SPP and shared parental pay
- An update on the tax treatment of common benefits and expense payments
- Basic adjustment of profits computation for business income tax and corporation tax
- Capital allowances update, loss relief and R&D tax credit; recent changes to R & D
- Quick review of changes to SA returns and the CT600
- VAT, the registration and deregistration point, use of VAT schemes, MTD and VAT and the common pitfalls on reclaiming VAT

Speaker: Rebecca Benneyworth is well known on the lecture circuit for her practical and down to earth approach to tax issues. She is a past Chair of the ICAEW Tax Faculty and currently sits on the board of the Faculty. She currently lectures for a wide range of organisations, and has also presented sessions for HMRC and HM Treasury on a number of occasions. She sits on the Administrative Burdens Advisory Board which advises HMRC on tax compliance burdens on businesses. She has a small digital accountancy practice in Gloucestershire.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

* **Please note: concessions on the standard fee for this course and the audit and accounting technical 'brush-up' (see page 46) are available for delegates not currently in work. For details phone 01737 223999.**

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
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Live Online			
Tuesday 14 May	AM	Live online using Zoom	CODE: MY14A4
Tuesday 17 September	PM	Live online using Zoom	CODE: SE17B4

TOPICAL TAX ISSUES FOR OWNER MANAGED BUSINESSES

Speaker: Mark Ward LLB CTA

Objectives: This course aims to cover the practicalities of dealing with close companies in 2024 and beyond. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to close companies.

Topics:

- Tax efficient profit extraction in 2024 and beyond
- Tax breaks and incentives when working from home
- Using alphabet shares safely
- Dividend waivers
- Director loan accounts
- When to wind a company up and how
- Purchase of own shares
- Using EMI schemes
- Issues with the off-payrolling rules in the private sector
- Recent cases that will impact close companies

Topics are flexible and new areas may be added.

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

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Live Online			
Thursday 18 April	PM	Live online using Zoom	CODE: AP18B4
Thursday 19 September	AM	Live online using Zoom	CODE: SE19A4

COMPLETE GUIDE TO TAX PLANNING FOR SMALL BUSINESSES

Speaker: Mark Ward LLB CTA

Objectives: This course aims to familiarise participants with the income tax, corporation tax, capital gains tax and inheritance tax matters that affect family businesses and their owners, and to make them aware of the tax planning opportunities that will enable their clients to minimise their current and potential tax liabilities.

Who should attend: Anyone advising SMEs on taxation.

Topics: As this course is designed to be topical specific topics may vary, however typically the course covers:

- Tax planning for sole traders and partnerships
- Extracting profits from the family company
- Anti-avoidance obstacles: IR35 and off-payroll working, settlements rules etc.
- Corporation tax mitigation
- Realising the value/passing on the family business - CGT and IHT implications

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical and understandable style, means Mark is much in demand on the lecturing circuit.

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Live Online			
Wednesday 28 February	PM	Live online using Zoom	CODE: FE28B4
Wednesday 3 July	AM	Live online using Zoom	CODE: JY03A4

PAYE AND NATIONAL INSURANCE UPDATE

Speaker: Alexandra Durrant FCA

Objectives: This course is designed to review the changes in the last year and those planned for the future in relation to PAYE and National Insurance legislation. It will also highlight some problem areas in payroll including employment status, taxation of benefits in kind and the changes to maternity, paternity and adoption provisions.

Who should attend:

- General practitioners and their staff
- General practitioners as employers
- Employees of companies with responsibility for payroll and related matters
- Returners to work needing an update on PAYE/NIC

Topics: Likely topics, but new topics to be added if relevant:

- Update on employment issues relevant to payroll
- PAYE update for 2024/25 tax year
- National insurance for 2024/25 tax year
- Employer NIC breaks to encourage employment
- National Minimum Wage update from 1 April 2023
- Automatic enrolment update and any current issues
- Review of voluntary payrolling of benefits
- Update on maternity, paternity, adoption leave/pay provisions for 2024/25
- IR35 and off payroll working update
- RTI (Real Time Information): update and any current issues
- Review of recent HMRC consultation relating to payroll matters

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

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Live Online			
Tuesday 5 March	AM	Live online using Zoom	CODE: MA05A4
Wednesday 13 March	PM	Live online using Zoom	CODE: MA13B4

A PRACTICAL APPROACH TO FORMS P11D

Speaker: Alexandra Durrant FCA

Objectives: Your clients may think they can ignore P11Ds as they only pay "business expenses" – are you sure?

- To remind delegates of HMRC P11D reporting requirements, the filing deadlines and potential fines
- To highlight where and how reporting can be minimised thereby saving clients/businesses costs
- To clarify just which expenses have to be reported
- To review the method of calculating the value for benefits in kind using either the "cash equivalent" or the special rules for the various benefits that employers may provide to employees for 2023/24 P11D returns

Who should attend:

- Practitioners: partners and staff who undertake P11D preparation for clients
- Accountants in business responsible for their company P11D forms

Topics:

- Why P11D forms are required
- Filing deadlines and penalties
- What expenses and benefits must be reported
- How to reduce reporting by use of:
  - ➢ Qualifying business expenses
  - ➢ Non-taxable payments and benefits
  - ➢ PAYE settlement agreements
- Review of the voluntary payrolling of benefits in kind – how does it work?
- Practical guidance on calculating the taxable value of benefits in kind

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

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Live Online			
Tuesday 5 March	PM	Live online using Zoom	CODE: MA05B4
Wednesday 13 March	AM	Live online using Zoom	CODE: MA13A4
Wednesday 2 October	PM	Live online using Zoom	CODE: OC02B4

PAYROLL SERVICES FOR CLIENTS: PRACTICAL PROBLEMS

Speaker: Alexandra Durrant FCA

Objectives: Running payrolls for clients isn't simply entering data and pressing a button! Payroll staff need to understand the rules and their role and their responsibilities. This is a practical course designed to cover the issues that can arise when running payrolls for clients. It will highlight potential problem areas such as casuals, "self-employed," calculating holiday pay, maternity rights, terminations and benefits and expenses pitfalls.

Who should attend:

- Practitioners and staff overseeing or running payrolls for clients
- Practitioners as employers themselves
- Employees of businesses with responsibility for payrolls

Topics: These are flexible and new issues may be added, however likely content will be:

- Update on employment issues relating to payroll
- Penalty regime relating to payroll
- Dealing with casuals, zero hours workers and "self-employed"
- Impact of IR35 and off payroll working rules on payroll
- Termination of employment update, redundancy process and payroll input
- Holiday entitlement and calculation of holiday pay
- Pay and other rights for employees on family related leave
- The voluntary payrolling of benefits in kind
- Auto enrolment for pensions – payroll involvement
- Review of recent HMRC consultations on payroll matters

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

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Live Online			
Tuesday 4 June	AM	Live online using Zoom	CODE: JN04A4
Tuesday 10 September	AM	Live online using Zoom	CODE: SE10A4

A PRACTICAL INTRODUCTION TO PAYROLL

Speaker: Alexandra Durrant FCA

Objectives: This course is designed to give attendees a good foundation in the payroll process. It will be invaluable for those working in payroll departments both in business and in practice. After listening there will be an opportunity to test new knowledge.

Who should attend: Anyone new to payroll wanting to gain knowledge and expertise. HR staff wanting to acquire a better understanding of the payroll process, payroll managers/staff who would like to enhance their understanding.

Topics:

- The payroll process
- Calculation of PAYE
- Calculation of National Insurance
- Tax Codes
- Statutory Pay
- Plenty of worked examples

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

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Live Online		
Thursday 3 October	Live online using Zoom	CODE: OC03A4

MAKING TAX DIGITAL UPDATE

Speaker: Rebecca Bennyworth MBE BSc FCA

Objectives: This course aims to cover the HMRC proposals for making tax digital for income tax and considers the impact it will have on your client base. Practical solutions will be offered to help you and your clients deal with digitalisation. The course will also cover issues practitioners are experiencing with MTD for VAT.

Who should attend: Everyone!

Topics: Topics are flexible and new areas may be added as and when announcements are made.

- Common errors when dealing with MTD for VAT
- Extending MTD to income tax: overview of the obligations and timing of mandation for the various client segments
- What digital records are required? Supporting the smallest clients with record keeping.
- Quarterly updates – when, what and how?
- End of Period – what is this? Accounting and tax adjustments; dealing with software links
- Particular issues for landlords
- The new penalty regime

Speaker: Rebecca Benneyworth is well known on the lecture circuit for her practical and down to earth approach to tax issues. She is a past Chair of the ICAEW Tax Faculty and currently sits on the board of the Faculty. She currently lectures for a wide range of organisations, mainly to accountant audiences, but has also presented sessions for HMRC and HM Treasury on a number of occasions. She sits on the Administrative Burdens Advisory Board which advises HMRC on tax compliance burdens on businesses. She has a small digital accountancy practice in Gloucestershire.

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Live Online			
Friday 11 October	AM	Live online using Zoom	CODE: OC11A4
Thursday 7 November	AM	Live online using Zoom	CODE: NO07A4

TAX PLANNING IN DIFFICULT ECONOMIC TIMES

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: With many businesses facing difficult choices and hard times ahead, this course will consider some simple tax planning ideas which advisers should consider for their self-employed and corporate clients.

Who should attend: Any tax professionals or accountants.

Topics: The course will cover:

- Business tax
- Tax issues around working from home
- Income tax considerations
- Losses
- Capital disposals to make ends meet
- Overdrawn loan accounts and excessive dividend payments

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

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Live Online			
Thursday 2 May	PM	Live online using Zoom	CODE: MY02B4
Wednesday 25 September	AM	Live online using Zoom	CODE: SE25C4

CORPORATION TAX UPDATE

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: Recent Finance Acts have introduced a number of changes to the corporation tax regime, exempting some capital gains, allowing further relief for companies' expenditure and reintroducing marginal tax relief. Consultation continues on reform of corporation tax, whilst at the same time challenges are being brought in the courts. This course will bring participants up to speed on the familiar and not so familiar elements of corporation tax. It will enable any practitioner who deals with companies or their directors to discuss the current issues and point the way to resolving them.

Who should attend: Anyone advising SMEs on taxation.

Topics: Will be drawn from:

- Taxable profits
  - Interface between accounting principles and tax
  - Specific problem areas
  - Capital allowances
  - Transfer pricing
- The corporation tax charge
  - Rates of tax
- Loss reliefs
  - Identifying the options and using them efficiently
- Capital gains
  - Computation and reliefs
- Groups of companies
  - The substantial shareholding exemption
- Close companies
  - Loans to participators
  - Personal service companies – IR 35
- Administration of corporation tax
  - The CT 600 form
  - Payments of corporation tax
  - Self assessment and enquiries

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

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Live Online			
Tuesday 23 April	AM	Live online using Zoom	CODE: AP23A4
Tuesday 8 October	AM	Live online using Zoom	CODE: OC08A4

HMRC INVESTIGATIONS

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: To enable participants to deal more effectively with HMRC.

Who should attend: Any tax professionals or accountants who have dealings with HMRC.

Topics: HMRC is increasing investigations that it opens. It is also using its new powers and its information gathering capacity to target those investigations more effectively. It has also upped the penalties that it is looking to charge. This course looks at how to engage with HMRC and includes the following topics:

- How HMRC chooses taxpayers to investigate
- Differentiating formal and informal investigations
- Time limits and Discovery Assessments – how long can HMRC go back?
- Dealing with the initial enquiry
- How to expedite the investigation process
- Taxpayers' rights and tactics
- Settling the investigation
- Mitigating penalties

The course will also cover agents' responsibilities in dealing with HMRC outside the investigatory framework. This is an area of increasing interest to both HMRC but also the bodies which regulate accountants and tax professionals.

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the "Big Four" accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

From 2013 Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis and gardening. He gives lectures on history which helps keep his presentation skills fresh.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Wednesday 17 April	Live online using Zoom	CODE: AP17B4

THE ACCOUNTANT ON THE FARM - A COMPREHENSIVE REVIEW

Speakers: David Missen BA FCA CTA and Grant Pilcher FCA CTA TEP N Sch

Objectives: Commodity prices are more volatile than ever, flat rate subsidies are disappearing, public finances are under pressure, green issues are coming to the forefront and an election is in the offing. Is the countryside a place to produce food, to save the planet or just to save tax? This intensive half day course will explore the challenges and issues faced by farming and rural communities and the solutions and opportunities available. It is aimed at keeping you up to date on what matters at what will be a key time for this specialist sector.

Who should attend: 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 would benefit most. It will also be suitable for those who would like an understanding of the specific problems encountered in the sector.

Topics: The topics covered will be set nearer the course date, but possible topics include -

- Pre-election (or post-election) tax strategies, threats and opportunities
- Latest tax developments including Autumn Statement 2023 and Spring Statement 2024
- Harvest 2023 results and prospects for 2024
- ELMS – not as expected, but is it working?
- The state of UK Agriculture in 2024 – how is it all fitting together?
- Cash management and capital funding requirements
- Farm economics and recent news from DEFRA
- Green developments - opportunities and tax consequences
- Inheritance tax and capital gains tax refresher
- Structures, successions, trusts, pensions and incorporation with illustrative case studies
- Capital Tax planning APR and BPR – what has changed or might change

Speakers: David Missen is an agriculture consultant at MHA. Having retired from Larking Gowen after thirty years of dealing with farming clients, he is now a farmer himself, and specialises in agriculture and rural accountancy issues. He is a founder member and past chairman of the ICAEW Farming and Rural Business Group, past editor of its newsletter, and co-author of the 2014 Wolters Kluwer publication *Agriculture: An industry Accounting and Auditing Guide*. David speaks regularly on rural and farming issues and brings real expertise to the course.

Grant Pilcher recently retired as head of agriculture for the East Anglian firm Larking Gowen, remaining as a consultant with them, having specialised in agricultural tax and accounting for over 30 years. Grant co-wrote *Agriculture: An industry accounting and auditing guide* with David Missen with whom he has lectured on this subject over many years. Grant was awarded a Nuffield Farming Scholarship in 2001 and has held many voluntary roles supporting agriculture in the eastern counties.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Thursday 2 May	Live online using Zoom	CODE: MY02A4

HOT TOPICS IN INTERNATIONAL TAX

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: To update participants on the issues that matter in International Tax.

Who should attend: Partners, senior managers, managers, and other staff who have clients with interests across national boundaries.

Topics: 2024 will see further work on implementation of parts of the BEPs 2.0 programme and the G7/G20 Tax Agreement on Corporate Tax. In particular the implementation of Pillar 2 of the OECD recommendations will see the introduction of an effective 15% global floor for corporate tax. The UK amongst a number of countries implementing Pillar 2 in domestic legislation by 31 December 2023. We look at the detail of the legislation.

The course will include the following developments: -

- Transfer Pricing developments
- The new minimum corporate tax rules
- Taxation of companies based on consumer infrastructure
- International investigations
- Hybrid developments
- Double Tax Treaty changes
- Permanent Establishment definitions
- Case law developments

2024 is likely to be a year of radical change for International Tax.

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the “Big Four” accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

In 2013 Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis, and gardening. He gives lectures on history which helps keep his presentation skills fresh.

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Live Online		
Thursday 7 March	Live online using Zoom	CODE: MA07A4

ESSENTIAL GUIDE TO TAX ISSUES ON BUYING, SELLING AND CLOSING DOWN BUSINESSES

Speaker: Kevin Read BSc ACA

Objectives: There are a huge number of tax issues to consider, across a range of taxes, when dealing with business purchases and disposals. This course will look at transactions from both the purchaser's and vendor's perspective. It will also consider issues relating to the closing down of businesses, something that, unfortunately, is more common than usual recently.

Emphasis will be given to the unexpected tax charges that can catch the unwary, along with the reliefs available when deals are planned and structured tax-efficiently. Key compliance areas, such as warranties and obtaining HMRC 'clearance', will also be discussed.

To aid delegates' understanding, the course material will include numerous numerical examples.

Who should attend: This course will be of interest to anyone who deals with acquisitions and disposals of SME businesses and who wishes to gain a greater understanding of key personal and corporation tax issues that they may come across.

Topics:

- Disposal of company
  - ➢ Sale of assets or sale of shares?
- Overview of key tax issues
- Business asset disposal relief
  - ➢ Problem areas with
    - o Shares
    - o Unincorporated trades
- Taking consideration as cash, shares or loan notes
- Deferred consideration and earn-outs
- Company and trade disposals – key corporation tax issues
- Compliance for purchaser
  - ➢ Warranties and indemnities
- Hive-downs
- Demergers
  - ➢ The different types
  - ➢ Use in pre-sale planning
- Closing down companies
  - ➢ Comparison of striking-off and MVL
  - ➢ FA 2016 anti-avoidance on 'phoenixing' companies
- Partnership capital gains issues (overview only)

All relevant matters from recent Finance Acts will be covered.

Speaker: Kevin Read qualified with PwC in 1988, spending his last 18 months there working in the corporate tax department. He worked as a tax tutor for BPP from 1989 until 1992, since when he has been a freelance tax lecturer and writer.

This role involves delivering training courses, both in classrooms and online, as well as writing technical material for courses and publications. He has been a co-author, for over thirty years, of a Budget publication sold to small practitioners and writes regularly for *Tax Insider*.

Kevin specialises in update courses for accountants, private client managers and lawyers, covering a very broad range of tax topics. He is a regular presenter of webinars and classroom courses for major training firms, such as Tolley and Mercier. He also presents tax updates on a variety of subjects to local societies of the ICAEW and CIOT. He is known for bringing clarity to even the most complex of areas and for emphasising tax traps to avoid, as well as tips that may reduce your clients' tax bill.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Thursday 10 October	Live online using Zoom	CODE: OC10A4

COMPLETE GUIDE TO TAX AND THE FAMILY

Speaker: Mark Ward LLB CTA

Objectives: This course is designed to give the delegate a refresher and update on family tax planning opportunities. It will cover a number of issues affecting individuals, their families and businesses. The course will explore the ways in which delegates can assist clients by ensuring their tax affairs are dealt with in the most tax efficient way.

Who should attend: All accountants in general practice who advise families on their tax affairs.

Topics:

- Children's income and gains
- Family provision - in a practical and tax efficient manner
- Spouse/civil partners tax planning
- Settlements legislation – avoiding being caught by the anti-avoidance legislation
- Residences - tax planning for the family home and other property
- Tax implications of Separation and Divorce
- Pensions
- The sale of a business and other exit planning for the business
- IHT mitigation for succession - including wills and trusts

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

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Live Online			
Thursday 23 May	AM	Live online using Zoom	CODE: MY23A4
Wednesday 6 November	PM	Live online using Zoom	CODE: NO06B4

COMPLETE GUIDE TO ACTING FOR SMALL BUSINESSES

Speaker: Martyn Ingles BSc FCA CTA

Objectives: This course aims to cover the practicalities of dealing with sole traders, contractors and personal service companies in 2024 and will consider the lifecycle of the business from start up to sale. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to sole traders, contractors and personal service companies and family businesses.

Topics:

- Employment status – am I really self-employed?
- IR35 and "off-payroll" working
- Tax planning in the opening years
- VAT issues for small businesses, including construction industry reverse charge
- MTD for income tax delayed but basis period changes go ahead
- CGT on the sale of the business

Topical issues may be added nearer the time.

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online			
Wednesday 24 April	AM	Live online using Zoom	CODE: AP24A4
Tuesday 2 July	AM	Live online using Zoom	CODE: JY02A4

PENSIONS - WHAT THE ACCOUNTANT NEEDS TO KNOW

Speaker: Martyn Ingles BSc FCA CTA

Objectives: With people living to a much greater age, various governments, to try to encourage people to save for the future, changed the pensions' regime dramatically over the years. Despite the changes in the 2023 Budget the system remains horrendously complex, but the rules present many opportunities. The course will look at the world of pensions to see how they impact upon clients especially in the area of retirement and estate planning. It is not a financial services course and will not be dealing with products from a financial services aspect.

Who should attend: Partners and staff involved in the provision of advice to clients particularly in the area of estate planning and related items.

Topics:

- Contributions – the ever changing limits! – Lifetime Allowances, Annual Allowances, Employer contributions
- The Finance (No.2) Act 2023 changes to pensions
- Tax charges if the limits are exceeded, including "scheme pays" election
- Don't overlook the State Pension– review missing years
- Planning advice
  - ➢Why spend your pension when you could spend your ISAs?
  - ➢Third party contributions
  - ➢Pensions as a part of estate planning
  - ➢My business is my pension scheme – CGT BAD relief on sale

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 6 March	PM	Live online using Zoom	CODE: MA06B4
Wednesday 2 October	AM	Live online using Zoom	CODE: OC02A4

ACTING FOR DOCTORS UPDATE

Speaker: Andrew Leal BA FCA

Objectives: This course will provide an update on the accounting, taxation, and NHS pension matters that those dealing with GP Practice clients in England need to know about and understand.

Who should attend: Aimed at accountants who regularly deal with this sector looking for an update.

Topics: The content of the course is likely to include some but maybe not all of the following:

- GP Contracts
- PCNs
- Incorporation
- The Long Term Plan
- Off-payroll working and IR35
- MTD and basis period changes
- McCloud impact
- Premises
- Final Pay Controls
- Pay Transparency
- Other "hot topics" relevant at the time of the course

Speaker: Andrew Leal is a Chartered Accountant and Head of Primary Care with MHA. He advises practices and regularly lectures on improving practice performance and maximising income. Andrew has over 25 years' experience working in this sector and is responsible for a team of staff servicing practices with over a million patients and numerous other healthcare professionals and their related businesses.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Thursday 12 September	Live online using Zoom	CODE: SE12A4

CAPITAL GAINS TAX AND INHERITANCE TAX REFRESHER

Speaker: Nigel May LLB (Hons) CTA TEP

Objectives: Governments over the years have constantly amended capital taxes with both IHT and CGT each receiving their share of attention in the last few years and it is very likely that there could be significant changes in this area. The aim of the course is to update delegates on recent Capital Gains Tax and Inheritance Tax developments as they settle in and as we see how they work in practice including pitfalls and planning opportunities. The course will need to focus on the planning aspects which remain for our clients.

Who should attend: All partners and staff advising clients on tax planning and compliance.

Topics:

- Entrepreneurs' relief – pitfalls and planning
- The importance of "trading company" status
- Interaction with other CGT reliefs
- PPR and other CGT changes around the house!
- Inheritance Tax refresher
- Business & Agricultural Property – 100% relief, are you sure?
- Nil rate band planning – what should we advise?
- What's left for the family home

Speaker: Nigel May was until March 2022 a senior tax partner in MHA MacIntyre Hudson working there for some 35 years. Nigel joined Gravita, a new practice aiming at the owner managed business market as a tax partner in October 2022 .

Having undertaken a law degree, Nigel commenced working for MacIntyre Hudson as a tax trainee in 1987. He qualified as a CTA in 1991 and worked as tax manager at a number of the firm's offices before being made up to tax partner at the firm's North London Office in 1998.

Nigel has encountered a wide range of tax issues, particularly those impacting on small and medium sized enterprises and high net wealth individuals including IHT and CGT planning, non-domicile and residence cases. He now principally deals with consultancy assignments, providing high level strategic tax advice but also enjoys "getting his hands dirty" with larger HMRC enquiry cases both for MHA MacIntyre Hudson and for smaller accountancy firms. Nigel has acted as expert witness in professional indemnity and matrimonial cases (in the latter case both as single and as joint expert) and has successfully directly represented clients at and has dealt with case preparation for the First Tier Tribunal.

Nigel's role entails dealing on a day-to-day basis with the issues arising from changes in case law, legislative and practice changes in the tax field and in particular, looking for the practical opportunities that arise. He has lectured to the accountancy profession on a wide range of direct tax issues, ranging from general tax awareness training through to capital and trust taxation.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 11 September	Live online using Zoom	CODE: SE11A4

CAPITAL GAINS TAX FOR OWNER MANAGED BUSINESSES

Speaker: Mark Ward LLB CTA

Objectives: To familiarise participants with the capital gains tax matters that affect owner managers and their businesses, and to make them aware of the interaction with other taxes and tax planning opportunities that will enable their clients to minimise their current and potential tax liabilities without falling foul of the various misguided beliefs and understandings that have grown over the years.

Who should attend: All partners and staff dealing with owner-managed businesses.

Topics: Will reflect topical issues, but will be drawn from:

- Business asset disposal relief
- Rollover relief
- Gifts relief
- Incorporation relief
- Substantial shareholdings exemption
- Structuring ownership of land and buildings
- Benefits of grouping for associated companies
- Targeted anti-avoidance rule on liquidations
- Planning for retirement and succession
- Planning for sale

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for over 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Tuesday 12 March	PM	Live online using Zoom	CODE: MA12B4
Wednesday 6 November	AM	Live online using Zoom	CODE: NO06A4

CAPITAL TAXES UPDATE

Speaker: Mark Ward LLB CTA

Objectives: During this seminar a number of CGT and IHT planning opportunities available to individuals and trusts will be considered. The session will include an appraisal of the most recent changes in legislation and case law, as well as the protective steps that clients may need to take.

Who should attend: Partners and staff in small and medium-sized practices.

Topics: These will reflect recent developments and changes, but are likely to include the following:

CGT business reliefs
- Business asset disposal relief
- Gifts of business assets
- Incorporation v disincorporation
- CGT on the sale of a business
- Replacement of business assets
- Incorporation of property businesses

CGT personal reliefs
- Private residences
- Use of trusts

Inheritance tax
- Agricultural and business property reliefs
- Transferable nil rate band
- Will drafting/reviewing
- Deeds of variation
- Use of trusts

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Tuesday 14 May	AM	Live online using Zoom	CODE: MY14C4
Thursday 3 October	PM	Live online using Zoom	CODE: OC03B4

TRUSTS: UPDATE AND PLANNING USING CLIENT CASE STUDIES

Speaker: Amanda Fisher CTA ATT (Fellow) TEP

Objectives: This course has been developed not only to offer an update and a refresher for Trusts but to use five case studies to explore the use and reality of trusts for our clients.

The case studies will be based on actual client scenarios and the content will cover the creation of the trusts, the tax efficiency of the trusts and the management of the trusts and how to keep them tax efficient and relevant to the client needs.

Who should attend: 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 course will also benefit practitioners who would like to increase their opportunities for advising clients on how to minimise their current and potential liabilities by using trusts.

Topics:

- Five client-based trust case studies
- 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

Speaker: Amanda Fisher has her own tax and accountancy practice of private clients, alongside her other freelance work as a lecturer and author. She also regularly works as a consultant to firms and practitioners on an array of tax matters, specialising in capital taxes, trust and estate matters.

Amanda has devoted time as a committee member for STEP and ICAEW and is currently the Branch Chair for the Thames Valley branch of The Chartered Institute of Taxation.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 22 May	AM	Live online using Zoom	CODE: MY22A4
Thursday 19 September	PM	Live online using Zoom	CODE: SE19B4

CONSTRUCTION INDUSTRY TAX REFRESHER

Speaker: Tim Palmer CTA ATT

Objectives: The aim of this course is to give delegates a detailed understanding of the current CIS tax rules and administration requirements. The full practical impact of tax and CIS will also be considered.

Who should attend: All accountants in practice and industry and other professional advisers who are involved in the taxation aspects of the construction industry, particularly in tax dealings with contractors and subcontractors.

Topics:

- The CIS tax responsibilities of both the contractor and subcontractor under the current CIS regime
- The 2024 changes to the construction industry tax regime
- Verification and the steps contractors have to take
- The dealings the contractor will have with HMRC
- The monthly CIS return: its completion and filing
- The CIS tax impact on the subcontractor
- How to reclaim CIS deductions under the new regime
- Is the subcontractor really self-employed?
- The recent tax case law on CIS status
- Current problems facing contractors and sub-contractors
- What really are construction operations
- Who are within the scheme and who are not
- Case studies
- The new CIS VAT domestic reverse charge
- The interaction of IR35 with the construction industry
- The relationship between IR35, CIS and the VAT reverse charge
- VAT areas relating to construction
- Practical CIS planning
- General overview

Speaker: Tim Palmer, is one of the UK's best known and popular tax presenters. He lectures frequently all over the UK on a wide variety of taxation subjects. He has been presenting such tax lectures for over 30 years.

Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm to their clients. He was also a member of the tax department of P&O where he specialised in Corporation Tax and the Construction Industry, being involved in the Bovis Construction Industry tax deduction scheme within the P&O Group. Additionally, Tim has written numerous articles in the Tax Press particularly with regard to his specialist areas of CIS, 'self-employed status issues,' NIC and PAYE matters, IHT and Corporation Tax. Tim is currently the Senior Partner of Palmer Consultancy Partnership.

As well as his lecturing, Tim is also a tax consultant with Gravita Chartered Accountants in London, providing tax advice and planning to both the clients and profession alike.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 3 July	PM	Live online using Zoom	CODE: JY03B4
Tuesday 8 October	PM	Live online using Zoom	CODE: OC08B4

DEALING WITH COMMON PROPERTY TRANSACTIONS

Speaker: Mark Ward LLB CTA

Objectives: The course will cover areas that practitioners encounter when dealing with clients with residential and commercial property interests.

Who should attend: The course is aimed at partners, managers and seniors who come across property related issues in their daily work.

Topics:

- Problem areas in the rental computation
- When to claim relief on furnishings
- Corporation tax issues under the new regime
- Structuring ownership of business premises
- Joint tenants or tenants in common?
- Allocating rental profits between property owners
- When to use declarations of trust and Form 17
- Furnished holiday lets
- Private residence relief
- CGT reporting
- Basic VAT issues
- Basic SDLT issues

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 4 July	AM	Live online using Zoom	CODE: JY04A4
Thursday 7 November	PM	Live online using Zoom	CODE: NO07B4

VAT PITFALLS AND SOLUTIONS

Speaker: Dean Wooten FCA CTA

Objectives: The course will cover VAT areas that practitioners and their staff encounter when dealing with owner managed clients.

Who should attend: The course is aimed at partners, managers and accounting staff who deal with owner managed clients in their daily work.

Topics:

- Registration issues – UK and overseas
- Common output tax liability errors
- Input tax recovery on directors, staff and freelancers costs
- Business entertainment and subsistence issues
- Business gifts – when we can and cannot recover VAT
- Dealing with international transactions
- Understanding transactions involving agents
- Common problems with the CIS domestic reverse charge
- VAT issues when refurbishing or converting properties
- Minimising VAT penalties

Speaker: Dean Wootten has been involved in tax training for many years and lectures and consults on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying with Grant Thornton in 1988. Dean then spent two years overseas with KPMG before returning to a medium-sized provincial firm in Sussex. Shortly after returning to the UK, Dean qualified as an Associate of the Institute of Taxation in 1991. Whilst in practice Dean gained valuable experience including five years at partner level. The experience gained enables Dean to focus his lecturing on the practical aspects of the issues presented.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 8 May	PM	Live online using Zoom	CODE: MY08B4
Tuesday 12 November	AM	Live online using Zoom	CODE: NO12A4

HOT TOPICS IN VAT

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course provides an update on important changes in VAT in the twelve months preceding the course. It will review recent cases and identify potential problem areas for clients. The course will explain in detail important or complex cases (including tribunal decisions) thus providing a better understanding of complex areas of VAT law.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics: The specific course content will depend on changes in the period before the course is run, but in general the course will follow the same structure covering:

- Any relevant Budget and Finance Act changes
- Identification of particular trends in cases or in the approach of HMRC
- Major VAT cases in the preceding twelve months: what the case established; likely impact on clients generally
- Topical tips and traps
- Important developments likely to occur in the succeeding months

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 28 February	AM	Live online using Zoom	CODE: FE28A4
Thursday 12 September	PM	Live online using Zoom	CODE: SE12B4

COMPLETE GUIDE TO INTERNATIONAL VAT ISSUES

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

A one-day seminar. It may be attended on the Flexiticket using **2 places** or for a single fee of £175+VAT

Objectives: This course aims to provide participants with a thorough knowledge of the VAT provisions relating to international transactions, in both goods and services, and the problems often encountered in this area. It will also cover the implications of selling goods and services online. By attending this course you will gain:

- A clear understanding of the way the rules work and how they are changing
- Greater confidence to advise clients undertaking international transactions
- An appreciation of some of the many pitfalls in this area and how to avoid them

Who should attend: All accountants involved in or advising on international transactions in goods and/or services.

Topics:

- The ongoing ramifications of Brexit
- Imports and exports
- Evidential requirements
- Supplying services to overseas customers
- When to charge VAT and when not to charge VAT
- Invoicing requirements
- Postponed accounting for import VAT
- Services bought from overseas suppliers
- The reverse charge
- Overseas VAT recovery
- Overseas registration issues
- EORI numbers
- Duty deferment
- Selling to EU consumers

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

DAY	Waiting Room: **09:00**	Course starts: **09:30**	Lunch break: **12:30-13:30**	Course ends: **16:30**

Live Online			
Thursday 21 March	DAY	Live online using Zoom	CODE: MA21D4
Thursday 17 October	DAY	Live online using Zoom	CODE: OC17D4

COMPLETE GUIDE TO ESSENTIAL VAT FOR CHARITIES

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: Ironically, charities have one of the most complicated VAT regimes of any business sector, meaning it is imperative that their finance teams and those advising them have a proper appreciation of the relevant VAT provisions. This course will review these provisions and their applications in depth, including some of the more problematic areas. By attending this course, you will gain:

- A thorough understanding of the VAT regime as it relates to the charitable sector
- A better awareness of those areas likely to cause the most problems and how best to deal with them
- A recognition of how to make the best of the complex VAT rules in this area

Who should attend: Anyone involved in auditing or advising charity sector clients. Finance directors and managers of charities requiring knowledge of the VAT regime applicable to their organisation.

Topics:

- Sponsorship
- Advertising
- Grants and donations
- Business/non-business
- Supplies to charities – standard rated, zero-rated and exempt supplies
- Supplies by charities – zero-rating and exemption
- Recovery of input by charities – problem areas

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Thursday 23 May	Live online using Zoom	CODE: MY23B4

COMPLETE GUIDE TO VAT AND PROPERTY TRANSACTIONS

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

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 property developers and others owning an interest in property. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients undertaking property transactions
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in land transactions or property developments.

Topics:

- Sale and letting of new residential property
- Selling and leasing new property to charities
- Non-exempt property transactions
- The option to tax in detail
- Sale and purchase of let property

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 25 April	AM	Live online using Zoom	CODE: AP25A4
Wednesday 16 October	PM	Live online using Zoom	CODE: OC16B4

COMPLETE GUIDE TO VAT IN THE CONSTRUCTION INDUSTRY

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course aims to provide participants with a thorough knowledge of the most topical aspects of this business sector. It covers the principal provisions relating to building contractors and others working in the construction industry. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients providing or receiving construction services
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in the building sector including undertaking property projects.

Topics:

- Zero-rated new construction work in detail
- Reduced-rated building conversions in detail
- The exclusions from zero-rating and reduced-rating
- Work for charities and housing associations
- The construction sector reverse charge

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Tuesday 4 June	PM	Live online using Zoom	CODE: JN04B4
Tuesday 5 November	AM	Live online using Zoom	CODE: NO05A4

TALES OF THE UNEXPECTED: VAT CASE STUDIES WITH OUTCOMES GOOD AND BAD

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course covers a number of varied aspects of VAT where surprising or disconcerting outcomes can arise, some to the benefit of taxpayers, some where dangers lurk. Using case studies, it aims to draw attention to both the positive and the negative implications of the situations covered.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics: Areas covered will include:

- Registration and deregistration
- Disaggregation/business splitting
- Triangulation post-Brexit
- Capital goods scheme (purchase and later disposal of a property)
- Let property TOGCs
- The disapplication of the option to tax – connected parties and exempt use
- Supplies of staff and the paymaster arrangements
- The reverse charge in “imported” services and its effect on exempt companies

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 17 April	AM	Live online using Zoom	CODE: AP17A4
Wednesday 25 September	PM	Live online using Zoom	CODE: SE25B4

COMPLETE GUIDE TO PARTIAL EXEMPTION AND THE CAPITAL GOODS SCHEME

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course aims to familiarise those attending with the full range of issues encountered in the area of partial exemption. Whilst the basic principle is relatively simple, the practical application in any given circumstance often requires an appreciation of the options available and potential opportunities and pitfalls that may exist. In addition, the capital goods scheme, which can extend the partial exemption provisions over ten years for some specific types of capital costs, merits close attention and an awareness of its dangers.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics:

- The basic principle of partial exemption
- The de minimis limits
- The simplified de minimis test
- The standard method
- Special methods
- The process of attribution
- The importance of "wholly and exclusively"
- Identifying a capital item for the capital goods scheme (CGS)
- CGS initial claims
- CGS adjustments
- The CGS elephant trap

Speaker: Neil Owen is an independent consultant and speaker, and managing director of VAT Advisory Services Ltd. He has worked exclusively in VAT for over thirty-five years, initially working for Customs & Excise and entering professional practice in 1990. He is a Fellow of the CIOT and of the British Institute of Agricultural Consultants, and was for ten years the National Secretary of the VAT Practitioners Group. He is a former editor of the book, *CCH VAT Planning*, and of the CIOT journal, *Tax Adviser*. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Thursday 6 June	Live online using Zoom	CODE: JN06B4

TOPICAL TAX TIPS AND PITFALLS

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: This course will include a range of topical tax issues not covered elsewhere in the two and a half day SESCA Tax Conference at the University of Kent, Canterbury. It is offered as a stand-alone course at the Conference. The sessions take place on the final day of the Conference. If you prefer to attend the whole conference please see page 87. This course may be attended using one Flexiticket place or can be purchased on an individual course basis (see page 4 for fees). Please note the course starts at the slightly earlier time of 09:15.

Who should attend: General practitioners with small and medium-sized clients.

Topics: The topics covered will be set nearer the conference date. Giles will work closely with the other speakers to make sure that there is no significant overlap in content, although Giles' very practical slant on some topics covered on the conference may be useful to attendees.

Possible topics include:

- Making Tax Digital – key points summary
- Advice about incorporation or disincorporation for small businesses
- Extracting funds from your small limited company
- New Basis Periods and Transitional Rules
- Off payroll working – a quick update

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

AM	Registration: **09:00**	Course starts: **09:15**	Coffee: **11:00**	Course ends: **12:30**

South East		
Friday 21 June	University of Kent, Canterbury	CODE: JN21A4

ACCOUNTING AND AUDIT COURSES PROGRAMME

See also 'Specialist' section (pages 62-81) for specialist audit and accounting topics

HALF YEARLY AUDIT AND ACCOUNTING UPDATES

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both. Please note there are also accounting and financial reporting updates (for those who do not require audit) also presented by Guy Loveday on Thursday 9 May, Wednesday 5 June, Thursday 13 June, Thursday 14 November, Tuesday 26 November and Thursday 5 December live online using Zoom, on Tuesday 3 December at Portsmouth, and Monday 10 June at Maidstone (see page 44).

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: In order to ensure up to the minute coverage the detailed programme will be set nearer the time. Topics are likely to include:

- Developments in FRS 105 and FRS 102 including Section 1A for small entities
- Relevant changes in company legislation
- The requirement for all companies to file profit and loss accounts
- Other technical, regulatory and professional developments
- Application of new and revised Auditing Standards
- Important Audit Monitoring points

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing
Set out below are the dates, venues and timing for all the updates. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

AM	Registration: **09:00**	Course starts: **09:30**	Break/Coffee: **11:00**	Course ends: **12:30**
PM	Registration: **13:00**	Course starts: **13:30**	Break/Coffee: **15:00**	Course ends: **16:30**

South East			
Tuesday 19 November	AM	Orida Hotel, Maidstone	Code: NO19A4
Southern			
Tuesday 11 June	PM	Portsmouth Marriott Hotel	Code: JN11B4
Live Online			
Thursday 9 May	PM	Live online using Zoom	Code: MY09B4
Wednesday 5 June	AM	Live online using Zoom	Code: JN05C4
Thursday 13 June	PM	Live online using Zoom	Code: JN13B4
Thursday 14 November	PM	Live online using Zoom	Code: NO14B4
Tuesday 26 November	AM	Live online using Zoom	Code: NO26C4
Thursday 5 December	PM	Live online using Zoom	Code: DE05B4

ACCOUNTING AND FINANCIAL REPORTING UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: We provide this course for delegates who are looking for a technical update but do not require the auditing content. A half yearly taxation update is held on the same day (see page 7). The course provides a practical and intensive review of developments in accounting and financial reporting over the last six months as well as changes likely to occur in the near future.

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: In order to ensure up to date coverage, the detailed programme will be set nearer the time. Topics are likely to include:

- Changes to FRS 105 and FRS 102, including Section 1A for small companies
- Practical implications of accounting changes
- Other topical issues affecting small and micro entity accounts
- Company legislation including the plans to require all companies to file profit and loss accounts
- Relevant technical releases and help sheets issued by professional bodies
- FRC staff fact sheets
- Other general areas of interest

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing:
Set out below are the dates, venues and timings for these courses. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

AM	Registration: **09:00**	Course starts: **09:30**	Break/Coffee: **11:00**	Course ends: **12:30**
PM	Registration: **13:00**	Course starts: **13:30**	Break/Coffee: **15:00**	Course ends: **16:30**

South East			
Monday 10 June	AM	Orida Hotel, Maidstone	Code: JN10A4
Southern			
Tuesday 3 December	AM	Portsmouth Marriott Hotel	Code: DE03A4
Live Online			
Thursday 9 May	AM	Live online using Zoom	Code: MY09C4
Wednesday 5 June	PM	Live online using Zoom	Code: JN05B4
Thursday 13 June	AM	Live online using Zoom	Code: JN13C4
Thursday 14 November	AM	Live online using Zoom	Code: NO14C4
Tuesday 26 November	PM	Live online using Zoom	Code: NO26B4
Thursday 5 December	AM	Live online using Zoom	Code: DE05C4

HALF YEARLY ACCOUNTING UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: All Chartered Accountants are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The course will provide delegates with an update on accounting issues relevant to accountants working in industry and commerce. Comprehensive notes are provided which facilitate future reference. The courses are run half yearly and maximum benefit is obtained by attending both.

Who should attend: Those working in industry and commerce who need to keep abreast of accounting developments.

Topics: Specific course content will be finalised shortly before each course date, but topics will most likely include:

- The latest thoughts and interpretations on working with IFRS and FRS 102
- Financial Reporting Review Panel – latest comments on strategic reports, press notices, IFRS and UK GAAP compliance and topical accounting issues
- Progress towards the replacement of the FRC
- Practical examples of current issues
- Relevant technical releases from professional bodies
- Relevant developments on the future of audit as they impact upon companies

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing: Set out below are the dates, timing and venues for all the updates. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees). There is a similar taxation update (see page 8 for details). The timing for all courses is as follows:

AM	Registration: **09:00**	Course starts: **09:30**	Break/Coffee: **11:00**	Course ends: **12:30**
PM	Registration: **13:00**	Course starts: **13:30**	Break/Coffee: **15:00**	Course ends: **16:30**

South East			
Tuesday 21 May	AM	Denbies Wine Estate, Dorking	Code: MY21A4
Wednesday 27 November	PM	Denbies Wine Estate, Dorking	Code: NO27B4
Southern			
Tuesday 25 June	AM	Portsmouth Marriott Hotel	Code: JN25A4
Thursday 21 November	AM	Portsmouth Marriott Hotel	Code: NO21A4
Thames			
Wednesday 26 June	AM	Coppid Beech Hotel, Binfield, Bracknell	Code: JN26A4
Wednesday 20 November	AM	Coppid Beech Hotel, Binfield, Bracknell	Code: NO20A4
Live Online			
Monday 20 May	PM	Live online using Zoom	Code: MY20B4
Thursday 27 June	AM	Live online using Zoom	Code: JN27A4
Friday 22 November	AM	Live online using Zoom	Code: NO22A4
Thursday 28 November	PM	Live online using Zoom	Code: NO28B4

A PRACTICAL ACCOUNTING UPDATE FOR RETURNERS

Speaker: Kate McCaffrey BSc FCA

Objectives: This course complements the practical tax 'brush-up' course (see page 9), providing an update for returners to the profession on audit and accounting topics. The basic principles of the topics will be covered, most of which will already have been learnt and understood by delegates, but which may not have been used for some time. The course will cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, who are qualified accountants that would like to "brush" up their knowledge and understand the changes that have taken place.

Topics:

- UK Accounting Standards Developments
- International Accounting Standards Developments
- Key Auditing Developments
- Corporate Governance
- Ethics
- Company Law update
- Relevant Legislation updates
- Current topics on the horizon

Speaker: Kate McCaffrey works in the Technical Services Group at BDO. She has a wide range of knowledge of auditing and accountancy across several industry sectors. Post qualification, Kate worked as a financial controller in industry. Kate presents practical and technical courses to staff, clients, membership organisations and professional bodies. Her knowledge and experience ensures that the training provided is specific and relevant to the audience.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

*** Please note: concessions on the standard fee for this course and the taxation technical 'brush-up' (see page 9) are available for delegates not currently in work. For details phone 01737 223999 or email courses@sesca.co.uk.**

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Tuesday 14 May	PM	Live online using Zoom	CODE: MY14B4
Tuesday 17 September	AM	Live online using Zoom	CODE: SE17A4

ANNUAL IFRS UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: This course will focus on the areas where UK companies and their auditors are being criticised for their failure to comply with IFRS. It will look at the ongoing impact of newly effective standards and changes in the pipeline.

Who should attend:

- Accountants responsible for preparing accounts under IFRS
- Accountants responsible for auditing accounts prepared under IFRS
- Accountants needing to convert from UK GAAP to IFRS

Topics: The course will cover:

- Developments in topical areas such as IFRS 16 on leases
- Latest Review Panel Annual Report concerning application of IFRS by UK companies
- Latest FRC Thematic Reviews
- Latest IASB developments including revisions to existing IFRS and IAS
- An update on the status of UK adopted IFRS and accounting equivalence
- Relevant papers issued by the UK Endorsement Board

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 24 April	PM	Live online using Zoom	Code: AP24B4
Tuesday 24 September	AM	Live online using Zoom	Code: SE24A4

EFFECTIVE NARRATIVE REPORTING

Speaker: Valerie Steward BSc BFP FCA FCCA FRSA

Objectives: To consider the development of narrative reporting requirements in areas such as ESG (environment, social and governance) and to ensure that auditors and preparers of financial statements are aware of the importance of good quality narrative reporting in financial statements and the detailed requirements for different sizes and types of business.

Who should attend: Individuals who prepare or review financial statements.

Topics: Narrative reporting – who needs to disclose what – providing a detailed break down of what needs to be included in the financial statements for different types of business.

A detailed review of the requirements in:
- The directors report
- The strategic report
- Streamlined energy and carbon reporting
- The s172 statement

How to prepare for the impact of upcoming changes to FRS102.

Common pitfalls to avoid.

The auditors responsibilities.

Speaker: Valerie Steward has worked with accountancy practices, helping them to develop their businesses and remain compliant for over 30 years.

She is the author and co-author of a number of technical guides and work programmes on topics ranging from anti-money laundering to clubs and associations. Valerie enjoys helping firms to develop, advising on training and staffing policy and all aspects of practice management. She also lectures widely on auditing, management skills and assurance services.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 25 April	PM	Live online using Zoom	CODE: AP25B4
Friday 15 November	AM	Live online using Zoom	CODE: NO15A4

PROBLEMS COMMONLY ENCOUNTERED UNDER IFRS AND FRS 102 - AND SOLUTIONS!

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: This course will focus on the areas where UK companies and their auditors are being criticised for their failure to comply with IFRS or FRS 102, as appropriate.

Who should attend: Accountants who are responsible for preparing accounts under IFRS, FRS 101 or FRS 102 and accountants who are responsible for auditing accounts prepared under IFRS, FRS 101 or FRS 102.

Topics: The course content will be finalised shortly before the course is run but will cover:

- Continuing problems involving the preparation and audit of cash flow statements
- Critical judgement and key estimation uncertainty disclosures – why do companies keep getting them wrong?
- Appropriate accounting policies and disclosures for companies that offer reverse factoring services to their suppliers
- Missing accounting policies – how can it happen?
- A suggested approach to the disclosure of the results of impairment reviews
- Guidance on other emerging problem areas

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 16 October	Live online using Zoom	CODE: OC16A4

ANTI-MONEY LAUNDERING AND FRAUD REFRESHER AND UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: Although the 2017 Money Laundering Regulations are well established now, they create a raft of practical problems for firms. This course will provide an insight into common issues that firms face when applying the regulations and how they should tackle these under the SARs regime.

Who should attend: Partners, managers and staff in accounting firms who want an update and refresher on AML compliance.

Topics:

- The 2017 Money Laundering Regulations – what they are and how they affect practitioners
- 2020 updates to the regulations and related CCAB guidance – what the impact has been in practice
- 'Risk management practices' – what they are and what firms need to do to comply
- Different types of fraud that affect accountants and their clients and how to spot them
- Reporting money laundering offences to the NCA – key do's and don'ts
- Update on cybercrime and GDPR – what it is and what it means for firms and their clients in practice
- AML regulation - the future direction of travel

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 1 May	AM	Live online using Zoom	CODE: MY01A4
Tuesday 5 November	PM	Live online using Zoom	CODE: NO05B4

ACCOUNTING FOR DIRECTORS' AND RELATED PARTY LOANS AND TRANSACTIONS

Speaker: Peter Herbert BSc FCA

Objectives: Company law includes detailed disclosure requirements for credit transactions with directors, including loans, and guarantees on behalf of directors which apply to all categories of company. Accounting standards differ both in terms of the definitions of related parties and the requirements for disclosures.

These requirements are often misunderstood and misapplied. In this course we will provide practical guidance to ensure the correct disclosures are made, taking account that the directors will usually prefer minimal disclosures.

The course will also provide an overview of the taxation implications of the relevant loans and transactions.

Who should attend: Partners and staff involved in the preparation and audit of company accounts.

Topics: The course will cover the following:

- Company law requirements
  - ➢ What is an advance?
  - ➢ What is a guarantee?
  - ➢ What is disclosable and for whom?
- Who qualifies as a related party?
  - ➢ For large and medium-sized entities?
  - ➢ For small entities?
- What are the related party disclosure requirements?
- Directors and key management personnel remuneration
  - ➢ Disclosure requirements under company law
  - ➢ FRS 102 disclosures
- Controlling party disclosures
- Disclosures in group accounts
- Taxation implications of the above

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Wednesday 6 March	AM	Live online using Zoom	CODE: MA06A4
Wednesday 18 September	PM	Live online using Zoom	CODE: SE18B4

ACCOUNTING FOR AND AUDITING ACADEMY SCHOOLS UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: This seminar will act as a refresher and an update on producing and auditing financial statements for Academy Schools. The latest Academies Accounts Direction and Financial Handbook will be explored in depth.

Who should attend: General practitioners who prepare and audit financial statements for Academy Schools and finance officers working within the sector.

Topics: Topical financial reporting issues will be covered in detail, with real Academy financial statements used throughout as a point of reference. The audit part of the session will focus on balancing efficiency and effectiveness when conducting the true and fair and regularity audits required by the ESFA. Specific topics covered will be:

- The latest Academies Accounting Direction - key changes and their impact
- Subjective areas of accounting for Academies – and how to get them right
- 2023/24 Updates on the Academies Financial Handbook
- ESFA feedback for Academies and their auditors – examples of good and poor practice
- Academy accounts ‘hot topics’ – what they are and how to address them

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Tuesday 2 July	Live online using Zoom	CODE: JY02B4

SRA ACCOUNTS RULES ANNUAL UPDATE

Speaker: Janet Taylor FCA

Objectives: Our annual update will provide delegates with a detailed review of the SRA Accounts Rules, any changes to the Rules in the last 12 months and a review of the most up to date guidance from the SRA relevant to the work and role of the Reporting Accountant.

Who should attend: All partners and staff who have a reasonable knowledge of the Rules and need to keep fully up to date with changes, be confident in recognising problem and riskier areas under these 'principles' based rules.

Topics: The session will cover:

- The rules themselves including:
  - ➢ Key definitions – including any changes
  - ➢ Dealing with receipts and payments and transferring money for the firm's charges
  - ➢ 'Opting out' – the use of Third Party Managed Accounts
  - ➢ Problem areas: including the prohibition on banking facilities (the latest warning notice and case studies) and how firms should be dealing with client balances
  - ➢ All the guidance from the SRA including a review of recent SDT rulings

- The role of the Reporting Accountant:
  - ➢ Terms of engagement and SRA expectations
  - ➢ The most up to date guidance from the ICAEW and the SRA regarding
    - ▪ Serious breaches/reportable issues – when to report?
    - ▪ Most common breaches reported
  - ➢ Feedback on the latest reports from the SRA

Speaker: Janet Taylor, owner Taylor Mowbray LLP, spent over 10 years with a top 20 accounting firm heading up their specialist solicitors' group. A highly experienced presenter, Janet provides relevant and practical training on a number of financial issues for lawyers. She is also a regular presenter of Solicitors' Accounts Rules training to a wide range of accounting and law firms through in-house and public seminars. Clients have included several major international and national law firms as well as reporting accountants. Janet is the current subject matter expert for the ICAEW's Solicitors Community Advisory Group, and co-author of the Law Society's '*Solicitors and the Accounts Rules Compliance handbook 4th Edition*'.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 20 March	Live online using Zoom	CODE: MA20A4

COMPANIES ACT REFRESHER

Speaker: John Selwood FCA

Objectives: The course is designed to keep accountants and auditors up to date with changes to the Companies Act 2006 and other relevant legislation.

Who should attend: The course is for all accountants involved in preparing and auditing company accounts and other aspects of company administration.

Topics: In recent years there have been significant changes to the Companies Act 2006 and there is more change to come, with reform at Companies House. This course looks at the more recent changes that have taken place and the practical ways that accountants can help companies comply as well as looking new proposals. In particular the course will cover:

- Changes at Companies House as part of Companies House reform
- Economic Crime Act 2022, as it impacts Companies House
- Proposed changes to the form and content of the small and micro company regimes
- The register of persons with significant control (PSC registers)
- Confirmation statements
- Appointment of directors
- Changes to share capital
- Company communications
- Changes regarding company names
- The electronic filing of company accounts
- Practical problems applying the accounts form and content requirements
- The content of strategic reports and other narrative reporting requirements
- Tips to avoid accounts being rejected
- A refresher on other Companies Act issues and other topical areas

Speaker: **John Selwood** is a Chartered Accountant and independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on auditing, financial reporting, company law and anti-money laundering.

Previously, he has been the technical partner for a top thirty firm of accountants and head of an accountancy network.

John is a member of ICAEWs Audit and Assurance Faculty's Technical and Practical Auditing Committee and has been involved with presenting and writing the material for the Audit & Assurance and Financial Reporting Faculty's events for many years. He also regularly writes for *Audit & Beyond*.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Thursday 14 March	Live online using Zoom	CODE: MA14A4

SUBJECTIVITY AND SCEPTICISM - THE THINKING AUDITOR'S GUIDE

Speaker: Ralph Tiffin FCA

Objectives: Scepticism is a fundamental trait required when making judgements. We must consider the nature and application of scepticism and understand the work and evidence to arrive at and support our judgements – demonstrating our questioning, agreeing or disagreeing with clients' judgements.

- To be fully aware of the subjective nature of accounting where judgement may be required as highlighted in many ISA's and accounting standards
- To understand just what being sceptical may means – might we be too sceptical?
- To understand the approach to work required in judging judgements – our clients' and our own. To consider the nature and application of scepticism
- To review the content of The Financial Reporting Council's (FRC's) Professional Judgement guidance for auditors (published 23 June 2022). Also consider implementation issues and feedback made since publication
- The Risk Identification and Assessment Process: Tips on Implementing ISA 315 - IFAC

Who should attend: Auditors and accountants who audit, prepare and review financial statements, particularly statements with subjective numbers. Directors who are responsible for their numbers.

Topics:

Subjectivity – when and what judgement is required?
Several ISA's and the underlying sections of FRS 102 cover potentially highly subjective amounts found in financial statements. Very obvious areas include:

- Provisions
- Impairments
- Revenue recognition

The need for thoughtful and documented judgements - A common feature is that in many cases published numbers depend on reliable estimates and underlying forecasts. This session aims to focus on what MUST be done to ensure compliance with the requirements of the ISAs and related FRS102 sections. Professional judgement has to be based on compliance with the rules. The FRC's comprehensive professional judgement guidance is a vital reference.

How sceptical should we be? Auditors are meant to be sceptical in thinking. That we are not sceptical enough is a continuing theme and message from the FRC and our Institutes. Once we have made our and reviewed the clients' judgements we have to "stand back" (a topical term) - we should review how critical or sceptical we have been.

Speaker: Ralph Tiffin, a Chartered Accountant and Registered Auditor, has a degree in Mechanical Engineering, qualified as FCA with Coopers & Lybrand. Ralph is principal of his own chartered accountancy firm and registered auditors. The practice concentrates on audit work. Ralph provides consultancy for many companies in the UK and overseas on subjects ranging from project appraisal (particularly the rail sector), applying IFRS, through to ethics and fraud prevention. He is the author of a range of texts on accounting (*Executive Finance and Strategy – Kogan Page*) and project appraisal. He is a regular contributor to CPD courses.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 25 September	Live online using Zoom	CODE: SE25A4

TOPICAL AUDIT PROBLEMS AND SOLUTIONS

Speaker: John Selwood FCA

Objectives: This course will look at real life problems that auditors have recently experienced and examine practical and efficient solutions.

Who should attend: All accountants involved in the audit of financial statements.

Topics: The course will cover the following topical problem areas:

- The revised FRC Ethical Standard especially considerations involving long association, provision of non-audit services, gifts and hospitality and fees
- Audit issues arising from recently revised ISAs including accounting estimates, risk and fraud
- Auditing groups
- Commonly reported problems in QAD monitoring reports
- Auditing going concern
- Getting materiality right
- Relying upon experts and dealing with service organisations
- Auditing pension scheme obligations

Speaker: John Selwood is a Chartered Accountant and independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on auditing, financial reporting, company law and anti-money laundering.

Previously, he has been the technical partner for a top thirty firm of accountants and head of an accountancy network.

John is a member of ICAEWs Audit and Assurance Faculty's Technical and Practical Auditing Committee and has been involved with presenting and writing the material for the Audit & Assurance and Financial Reporting Faculty's events for many years. He also regularly writes for Audit & Beyond.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Thursday 10 October	Live online using Zoom	CODE: OC10B4

INTRODUCTION TO CHARITY ACCOUNTS

Speaker: Peter Herbert BSc FCA

Objectives: Charities are everywhere and are staple clients of many firms of accountants. There are nearly 170,000 separate charities registered with the Charity Commission in England and Wales with a further 18,000 linked charities.

This course will review the regulatory regime in which charities operate and provide the fundamentals needed for the preparation and scrutiny of charity accounts.

Who should attend: Partners and staff with little or no experience in charity reporting and those requiring a refresher of charity accounts fundamentals. The course will also benefit new charity treasurers and trustees.

Topics:

- Charities, charitable objectives and public benefit and the impact on the accounts
- What accounts are required and when do they need external scrutiny
- Charity funds and fund accounting
- Practical issues in the preparation of charity accounts
- The charity audit and report - an overview
- Independent examination – understanding the work and report
- Reporting to charity regulators

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Tuesday 19 March	Live online using Zoom	CODE: MA19A4

INTRODUCTION TO PENSION SCHEME ACCOUNTS

Speaker: Peter Herbert BSc FCA

Objectives: The audit of pension schemes is one of the specialist areas which many firms are involved in and which is of special interest to the regulators. Many of the issues in pension scheme accounts are unique and not covered in more general accounting and auditing training.

This course will review the regulatory regime in which pension schemes operate and provide an understanding of the fundamentals needed for the preparation and audit of pension scheme accounts.

Who should attend: Partners and staff with little or no experience in pension scheme accounts and those requiring a refresher of pension scheme accounts fundamentals.

Topics:

- The pension scheme and how it works
- The types of pension scheme – defined benefit or money purchase and the impact on the accounts
- Understanding the accounting and reporting requirements
- Understanding how to account for the transactions in the scheme
- Accounting for assets and liabilities
- Practical issues in audit and reporting
- Reporting to The Pensions Regulator

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Thursday 14 March	Live online using Zoom	CODE: MA14B4

PENSION ACCOUNTING, AUDIT AND REGULATORY UPDATE

Speaker: Valerie Steward BSc BFP FCA FCCA FRSA

Objectives: The pension scheme SORP continues to present challenges for accountants and auditors. This update will address all the common accounting and disclosure problem areas and how they should be tackled in practice.

The seminar will also reflect on the challenges faced by firms when auditing pension schemes and how they can successfully comply with the ISAs, whilst still maximising audit efficiency. In addition, we will update delegates on all recent regulatory changes and important pronouncements from the Pensions Regulator and the Pensions Research Accountants Group (PRAG).

Who should attend: Partners, managers and staff in accounting firms who prepare and audit pension scheme financial statements.

Topics:

- Which pension schemes do and don't need audited accounts
- The Pensions SORP – key changes and how these have been addressed
- Effective but efficient auditing of pension schemes
- Reliance on service organisations when auditing pension schemes – key tips and traps
- What QAD expect to see on a pension scheme audit file
- Reporting on contributions – what goes wrong and when to qualify the audit report
- The Pensions Regulator – recent Codes of Practice and other topical issues
- How the prepare for the impact of upcoming changes to FRS102

Speaker: Valerie Steward has worked with accountancy practices, helping them to develop their businesses and remain compliant for over 30 years.

She is the author and co-author of a number of technical guides and work programmes on topics ranging from anti-money laundering to clubs and associations. Valerie enjoys helping firms to develop, advising on training and staffing policy and all aspects of practice management. She also lectures widely on auditing, management skills and assurance services.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Friday 18 October	Live online using Zoom	CODE: OC18A4

INTRODUCTION TO HOUSING ASSOCIATION ACCOUNTS AND AUDIT

Speaker: Peter Herbert BSc FCA

Objectives: Preparing and auditing housing association accounts can be challenging for those who are new to the sector. This seminar will provide a broad-based introduction to the format of the accounts and the underpinning regulations along with a detailed insight into the tests that should be performed when auditing housing associations.

Who should attend: Accountants and other financial professionals new to Housing Associations who are or will be involved in statutory and management reporting and auditing in the sector.

Topics:

- The rules that underpin housing association financial statements and audit
- The format of the accounts and detailed disclosure requirements
- Narrative reporting
- How 'normal' accounting rules differ for housing associations
- How to plan, perform and complete a housing association audit

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Tuesday 12 March	Live online using Zoom	CODE: MA12A4

HOUSING ASSOCIATIONS ACCOUNTING AND AUDIT UPDATE

Speaker: Valerie Steward BSc BFP FCA FCCA FRSA

Objectives: FRS 102 and the Social Housing SORP have been used by Registered Social Landlords across the UK since accounting periods beginning on or after 1 January 2015. This seminar will provide an update on practical challenges and emerging issues relevant to those working in or advising businesses in the sector.

Who should attend: Accountants and other financial professionals within Housing Associations involved in statutory and management reporting and external accountants and auditors who act for clients in the Housing sector.

Topics:

- New accounting and disclosure developments relevant to housing associations
- Tricky accounting areas – and how to get them right
- Accounting and auditing challenges in housing groups and how to tackle them
- Other relevant regulatory changes – including recent changes from the Regulator of Social Housing - how these will impact on financial reports
- A file reviewer's perspective of common problems encountered when auditing housing associations
- How to prepare for the impact of the upcoming changes to FRS102

Speaker: Valerie Steward has worked with accountancy practices, helping them to develop their businesses and remain compliant for over 30 years.

She is the author and co-author of a number of technical guides and work programmes on topics ranging from anti-money laundering to clubs and associations. Valerie enjoys helping firms to develop, advising on training and staffing policy and all aspects of practice management. She also lectures widely on auditing, management skills and assurance services.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 8 May	Live online using Zoom	CODE: MY08A4

SPECIALIST COURSES PROGRAMME

SPECIALIST

EMPLOYMENT AND BUSINESS LAW UPDATE

Speaker: Louise Dunford LLM LLB Barrister

Objectives: The course provides a good overview of a number of areas of law, concentrating on the topics likely to be most useful to you in your day to day dealings with clients and staff. Given the current state of uncertainty on so many fronts, post pandemic, the continuing impact of Brexit, and evolving government policy, it is difficult to be very specific about most aspects of the content at the time of writing. Therefore, what is laid out below is for guidance only and is fairly generic; not all topics will be covered and some may be subject to modification. Broadly the course will attempt to cover the legal issues that accountants who assist SMEs are likely to deal with or be asked about in the course of their normal work, and will round up all the important case law from the previous 12 months.

Who should attend: Employers and professionals providing advice to small companies and directors of SMEs.

Topics:

Employment Law

- Employment Status, including
  - ➢ Recent gig economy and IR35 cases
  - ➢ Self-employment generally, directors' status
- Payroll developments
  - ➢ Minimum wage - recent cases
  - ➢ Working time – holidays and holiday pay, working time
- Family Friendly Reforms – what has happened and what might happen
- Unlawful discrimination – case law round-up and new developments, including recent developments around disability and mental health
- Current concerns including WFH, hybrid and flexible working

Company Law

- Directors' duties – new developments
- Personal liability for directors
- Shareholder agreements and minority protection
- Share Purchase Agreements and recent case law
- Transfer of Shares - pitfalls
- Insolvency law – recent cases
- Companies House reform

Other Business Law

- Selling a business
- Data Protection Reform post Brexit
- Succession Issues in SMEs and considering Business LPAs

Speaker: Louise Dunford has been involved in training for accountancy professionals and for commercial companies for over 25 years, specialising in employment law, company law and professional negligence. She has been a consultant for many years for Complete HR Ltd, providing HR support to SME clients on all matters connected with recruitment and employment, including contract drafting, investigations, dismissals, tribunal and settlement work. Louise also had a long running relationship with Portsmouth University, as a lecturer and as an associate lecturer and supervising undergraduate and postgraduate dissertations.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 18 April	AM	Live online using Zoom	CODE: AP18A4
Wednesday 9 October	PM	Live online using Zoom	CODE: OC09B4

CHARITIES UPDATE

Speaker: Jayne Rowe

Attendance at this course together with 'Charities Legal Update' (page 65) is offered to registered charities at a combined concessionary fee of £100+VAT (half the standard fee).

Objectives: Charities continue to be affected by developments in accounting, tax, and external scrutiny is greater than ever both in terms of general public interest and interest by the regulator. There has been a lot of newly issued or updated guidance by the UK regulators as a result. This popular half-day course keeps you up to date with all the recent key developments.

Who should attend: Charity finance staff, charity auditors and examiners, advisors and charity trustees, especially treasurers.

Topics:

- Changes to the SORP, in accounting and annual reporting
- Charity regulator developments across the UK
- Revised guidance for auditors and examiners on their duties
- Overview of recent direct tax and VAT issues
- Charity cases of interest

Speaker: Jayne Rowe joined Crowe in January 2023 and is a Partner in their Social Purpose and Non-Profit Team. Jayne has more than 20 years' experience in the sector and has a breadth and depth of experience adding value to clients through due diligence work, advisory projects, governance and training advice and benchmarking services.

Jayne is a trustee of an overseas disability charity and was a member of the ICAEW Charity Committee. Jayne was also responsible for the establishment of the Charity Leaders Group in Cambridge, which provides a forum for charity Trustees and Senior Management to discuss key issues facing the sector.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 26 September	PM	Live online using Zoom	CODE: SE26B4
Tuesday 15 October	AM	Live online using Zoom	CODE: OC15A4

SPECIALIST

CHARITIES LEGAL UPDATE

Speaker: Claris D'cruz

Attendance at this course together with 'Charities Update' (page 64) is offered to registered charities at a combined concessionary fee of £100+VAT (half the standard fee).

Objectives: This course will provide an overview of the most important legal developments in the last 12 months for small and medium-sized charities. The course will cover current hot topics and areas of regulatory focus. We will also look at new key Charity Commission guidance and consultations, significant Commission investigation or compliance cases, and the main developments from the ICO and Fundraising Regulator. The course will also cover any major new Charity Tribunal or court cases relevant to charities that have been reported up to two weeks prior to the course.

Who should attend: Charities staff, trustees and their advisors.

Topics:

- **Introduction**
  - What is a charity?
  - Different charity structures
  - Legal implications of the different legal structures
  - The landscape for regulated charities
  - Current challenges facing the sector
- **Key Issues for Charity Trustees**
  - Six main governance duties
  - Core duties under the Charities Acts
  - Handling and reporting serious incidents
  - Safeguarding and protecting people
  - Risks and sector trends
  - Other topical issues
- **The Charities Act 2022**
  - Update on implementation
  - How are provisions working in practice?
- **Legal Developments**
  - Case law update
  - Charity Tribunal cases
- **Charity Commission**
  - Overview for 2023-2024
  - Strategy for 2024-2029
  - Significant status and regulatory cases
  - Guidance and alerts – what's new?
  - Consultations
  - Engagement with charity trustees
- **The latest from other regulators**
  - The ICO
  - The Fundraising Regulator
- **On the Horizon**
  - What to watch out for

Speaker: Claris D'cruz qualified as a barrister in 1994 and left the Bar to become a charity lawyer. She has over 25 years' experience as a governance lawyer advising charities, of all sizes, nationwide on a wide range of governance matters. She worked as an in-house legal adviser for a registered charity then as a Charity Commission lawyer, before going into private practice. She was head of charities at a major NE law firm, before becoming a charity consultant. She has over 12 years' experience on a range of charity and not-for-profit boards. Claris also has over 25 years' experience of providing training for trustees and senior charity executives, as well as CPD training for lawyers and other professionals on charity law and governance issues.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**
PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online			
Thursday 26 September	AM	Live online using Zoom	CODE: SE26A4
Tuesday 15 October	PM	Live online using Zoom	CODE: OC15B4

CHARITY TRUSTEESHIP: GETTING IT RIGHT FOR FINANCE PROFESSIONALS

Speaker: Claris D'cruz

Objectives: Being a charity trustee is richly rewarding and can help professionals become well-rounded advisors. However, Kids Company and other recent cases have highlighted the risks professionals face, when things go wrong. In this session Claris D'cruz, a specialist charity lawyer with significant charity board experience, will explain the core duties and responsibilities of a charity trustee, the additional responsibilities that a professional may have and the steps that they can take to protect themselves.

Who should attend: Accountants, auditors and finance professionals who are charity trustees.

Topics:

- The role of charity trustees
- Duties that underpin good governance
  - ➢The six main duties
  - ➢Duties under the Charities Act
- The higher-level duty for a finance professional
- What to do when things go wrong
- Consequences of failing to discharge your duties
  - ➢Potential liability
  - ➢Professional implications
- Lessons to be learned from recent cases
- Practical tips on how to carry out the role properly
- Steps you can take to protect yourself

Speaker: Claris D'cruz qualified as a barrister in 1994 and left the Bar to become a charity lawyer. She has over 25 years' experience as a governance lawyer advising charities, of all sizes, nationwide on a wide range of governance matters. She worked as an in-house legal adviser for a registered charity then as a Charity Commission lawyer, before going into private practice. She was head of charities at a major NE law firm, before becoming a charity consultant. She has over 12 years' experience on a range of charity and not-for-profit boards. Claris also has over 25 years' experience of providing training for trustees and senior charity executives, as well as CPD training for lawyers and other professionals on charity law and governance issues.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 12 June	Live online using Zoom	CODE: JN12A4

SPECIALIST

ETHICS: PRACTISING PROFESSIONALISM

Speaker: Jez Williams FCA

This course is available on the Flexiticket when combined with the Ethics: Ethical Decision-Making course. Together both courses use one place on any Flexiticket. Please see page 68 for more information on the Ethics: Ethical Decision-Making course. If not booked as part of the Ethics courses bundle, the individual course fee is £30+VAT.

Objectives: To assist delegates in understanding the ethical frameworks and rules for accountants and especially for audit engagements, including practical examples of ethical threats and safeguards.

Who should attend: The session is relevant to all accountants **and is a mandatory element of the ICAEW's CPD requirements from November 2023**.

Topics:

- Professional ethics and the public interest duty
- The fundamental principles
- An overview of ICAEW Code of Ethics and the ACCA Code of Ethics and Conduct
- FRC Ethical Standard – who needs to apply?
- Common Professional Ethics Issues:
  - Acceptance of (re)appointment – what to consider
  - Relationship threats and how to respond
  - Familiarity and intimidation
  - Other areas of conflict

The course topics have been mapped to the learning outcomes stipulated by the ICAEW. More information is available on the Ethics: Practising Professionalism course page on our website www.sesca.co.uk.

Speaker: Jez Williams, is a chartered accountant who qualified with KPMG before joining the training sector in 2000. Jez is a well-known speaker in the UK accounting circuit and a member of the ICAEW Audit and Assurance Faculty Board from 2017 to 2023. He regularly presents for ICAEW and for other established training providers in the UK.

Recorded Online		
Available anytime with 1 year's access	1 hour recorded online course accessed via the SESCA website	CODE: ET01A4

ETHICS: ETHICAL DECISION-MAKING

Speaker: Jez Williams FCA

This course is available on the Flexiticket when combined with the Ethics: Practising Professionalism course. Together both courses use one place on any Flexiticket. Please see page 67 for more information on the Ethics: Practising Professionalism course. If not booked as part of the Ethics courses bundle, the individual course fee is £40+VAT.

Objectives: This two hour recorded online course will assist delegates in ethical decision-making. It includes a reminder of the fundamental principles and the 'threats and safeguards' model as well as five case studies.

Who should attend: All accountants.

Topics:

- The fundamental principles and the 'threats and safeguards' model
- Ethical decisions: case studies
    - The new client
    - A taxing matter
    - Taking stock of a puzzling problem
    - A fresh start
    - Perks of the job

The course topics have been mapped to the learning outcomes stipulated by the ICAEW. More information is available on the Ethics: Ethical Decision-Making course page on our website www.sesca.co.uk.

Please note, the 2 hour duration is the expected time taken to complete the course as it includes time to read and reflect on each case study before continuing with the recording.

Speaker: Jez Williams, is a chartered accountant who qualified with KPMG before joining the training sector in 2000. Jez is a well-known speaker in the UK accounting circuit and a member of the ICAEW Audit and Assurance Faculty Board from 2017 to 2023. He regularly presents for ICAEW and for other established training providers in the UK.

Recorded Online		
Available anytime with 1 year's access	2 hours recorded online course accessed via the SESCA website	CODE: ET02A4

SPECIALIST

ESSENTIAL GUIDE TO SHARE AND BUSINESS VALUATIONS

Speaker: David Bowes FT FRICS EWI

Objectives: Many accountants carry out valuations of shares and businesses only infrequently, and many more would like to be able to add valuation to their portfolio of services. This course covers all the basic valuation concepts and principles, concentrating on the smaller entities that comprise the overwhelming majority of businesses in the UK. Therefore, both for beginners or occasional valuers who feel that they might benefit from an update or refresher, this half day session is highly recommended.

Who should attend: Partners, managers and staff who may become involved with share and business valuation issues, whether in practice or in industry, and for all purposes, including shareholder disputes, tax including employee share awards, incorporation, divorce, trustee transactions and other sales and purchases of shares and businesses.

Topics: It will highlight those all important negotiations with SAV, including valuations of shares for EMI options and goodwill on incorporation. However, it also deals with the many valuation principles likely to be of application in non-tax situations, and discusses the crucial issue of discounts.

The topics to be covered will include:

- Valuations of smaller companies and unincorporated businesses
- Different types of shares
- Accounts' analysis
- Valuation methods – earnings, assets, dividend yield, industry customs
- Comparability
- Market value
- Tax valuations and negotiating with SAV
- Adjustments to profits
- Information for valuation purposes
- Goodwill

Speaker: David Bowes, joined the Bruce Sutherland partnership in 2009, having been 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, (now Shares and Assets Valuation) of HM Revenue and Customs. He is an experienced lecturer on valuation and writes articles on the subject for the professional press. He has appeared as an expert witness in Court and the Tax Tribunal. He is a former Honorary Secretary of the Society of Share & Business Valuers, and the author of Tolley's Practical Share and Business Valuation.

AM	Waiting Room **09:00**	Course start **09:30**	Break **11:00**	Course ends **12:30**
PM	Waiting Room **13:00**	Course start **13:30**	Break **15:00**	Course ends **16:30**

Live Online			
Wednesday 22 May	PM	Live online using Zoom	Code: MY22B4
Wednesday 18 September	AM	Live online using Zoom	Code: SE18A4

HOW TO BE BETTER REMEMBERED, REFERRED AND RECOMMENDED

Speaker: Mark Lee FCA

Objectives: To understand the importance of being better Remembered, Referred and Recommended (the 3 Rs) in order to boost the right referrals that will help a practice grow.

Who should attend: Sole practitioners, managers and partners responsible for growing the profitability of their practice.

Topics: By the end of the session, participants should be able to…

- Understand what to do to stop being seen as 'just another accountant'
- Use Mark's 5Ms approach to avoid wasting time and money on the wrong marketing and social media activities
- Identify where they are on the 3 Rs rating scale and what they can do to move up to where they want to be
- Be able to harness the power of Linkedin for lead generation without wasting loads of time doing stuff that doesn't help accountants.

Speaker: Mark Lee loves sharing strategic insights and advice with accountants and tax advisers who want more leads, more referrals and to stand out from the competition. He is passionate about helping individual accountants to achieve more success in their careers and practices.

He qualified as a chartered accountant in 1982 and was in practice until 2006. He worked for all sizes of firm including BDO in London who headhunted him from a smaller practice. In more recent years Mark has written and spoken for hundreds of firms and thousands of accountants. His blogposts, LinkedIn posts and online articles have been viewed well over a million times. His talks and advice avoid fluff, hype and waffle. Rather they are always focused on what is practical and commercial.

Mark is a proud Fellow of the ICAEW, The CIOT and the Professional Speaking Association. He recently completed a seven year spell as Treasurer of The Magic Circle, which probably means he is the only truly magical speaker in the UK accountancy profession.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Wednesday 9 October	Live online using Zoom	CODE: OC09A4

SPECIALIST

BUSINESSES IN TROUBLE - HELPING YOUR CLIENT IN TIMES OF CRISIS

Speaker: Philip Ridgway CTA (Fellow) FABRP Barrister

Objectives: In times of economic crisis even some previously successful businesses are finding themselves in financial difficulty. One of the options available to them is to re-structure in order to improve performance and financial efficiency, and, ultimately, survive. This talk highlights the various courses of action open to struggling businesses together with their tax implications.

Who should attend: Any tax advisor concerned that some of their clients may struggle financially.

Topics:

- The tax implications of ring-fencing a financially burdensome business, company or division (CT/CGT, VAT/TOGC, SDLT), covering share/asset disposals, demergers and hive-down within groups
- The tax implications of restructuring a company's debt (mainly loan relationship rules), covering the rescheduling/release of debt and debt for equity swaps.
- The tax implications of insolvency proceedings (mainly corporation tax, group relief etc, but also CGT/ negligible value claims for shareholders).
- A high-level look at HMRC's guidance on the taxation of businesses

Speaker: Philip Ridgway joined Temple Tax Chambers when he returned to the Bar in June 2007. He lectures and advises on all areas of revenue law both corporate and personal but has a particular interest in corporate tax matters including acquisitions and disposals, reconstructions and demergers, MBO's, returning capital to shareholders, s425 schemes, Stamp Duty, SDLT and SDRT.

Philip has a special expertise in the taxation of insolvent companies, members' voluntary liquidations (including s110 schemes) and bankruptcy, and lectures regularly.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Wednesday 20 March	Live online using Zoom	CODE: MA20B4

SPECIALIST

HOW TO BE AN EFFECTIVE NETWORKER

Speaker: Toni Trevett FCIPD

Objectives: This session will build your confidence and provide you with tips and techniques for networking, that will include approaching new people, starting and maintaining meaningful conversations and developing those into good business contacts.

Who should attend: This session is ideal for anyone looking to develop their networking skills whether that is to gain more visibility, develop more contacts or just increase confidence.

Topics:

- What is active networking and why do we need to do it?
- Preparation – presenting yourself, who are you and what's your elevator pitch?
- Ice breakers and openers
- How to join and leave groups or conversations with ease
- Building rapport and trust
- The ARE technique
- One off encounters v regularly engaging / following up
- How to expand your network

Speaker: Toni Trevett, Director of CompleteHR Ltd, is a CIPD qualified and vastly experienced HR practitioner, mediator, consultant, trainer and coach, with a background in general management and HR. She is also an employment law / employee relations specialist and sits part-time to hear cases for the Employment Tribunal judiciary in South London.

Toni has been training for many years, specialising in management development, professional skills and personal development, as well as people management and employment law. She delivers both public courses as well as in-house programmes. Many of her clients book her year after year and give outstanding commendations.

Toni has experience of working with a variety of large global organisations and as well as SME's. She works regularly for a number of clients in a variety of sectors. This includes banking and insurance, legal, manufacturing, professional services, the charity sector, transport and logistics, recruitment, oil and gas, travel, pharmaceutical, technology, education, retail, government, TV, film and media to name just a few.

Toni was formerly a Human Resources Director within the BAA plc group. She is a fellow of the Chartered Institute of Personnel and Development.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Friday 14 June	Live online using Zoom	CODE: JN14A4

SPECIALIST

IMPROVE YOUR COMMUNICATION SKILLS

Speaker: Toni Trevett FCIPD

Objectives: Our communication skills are intrinsic to everything we do at work. At the end of this session, you will have gained the skills necessary to communicate clearly, concisely, and confidently. To be an all round more efficient and effective communicator.

Who should attend: This course is suitable for anyone wishing to develop their communication skills.

Topics:

- The essential components for effective communications
- 4 main communication styles
- Barriers to successful communications and how to overcome them
- Key skills including, preparing, matching, delivering, questioning and active listening
- Master the non-verbal communications including body language
- The challenges i.e., conflict, difficult conversations and constructive feedback
- Confidence and impact
- Influencing and persuading

Speaker: Toni Trevett, Director of CompleteHR Ltd, is a CIPD qualified and vastly experienced HR practitioner, mediator, consultant, trainer and coach, with a background in general management and HR. She is also an employment law / employee relations specialist and sits part-time to hear cases for the Employment Tribunal judiciary in South London.

Toni has been training for many years, specialising in management development, professional skills and personal development, as well as people management and employment law. She delivers both public courses as well as in-house programmes. Many of her clients book her year after year and give outstanding commendations.

Toni has experience of working with a variety of large global organisations and as well as SME's. She works regularly for a number of clients in a variety of sectors. This includes banking and insurance, legal, manufacturing, professional services, the charity sector, transport and logistics, recruitment, oil and gas, travel, pharmaceutical, technology, education, retail, government, TV, film and media to name just a few.

Toni was formerly a Human Resources Director within the BAA plc group. She is a fellow of the Chartered Institute of Personnel and Development.

PM	Waiting Room: **13:00**	Course starts: **13:30**	Break: **15:00**	Course ends: **16:30**

Live Online		
Tuesday 12 November	Live online using Zoom	CODE: NO12B4

GUARDING THE LEDGER - CYBER SECURITY AND DATA PROTECTION

Speaker: Dr Stephen Hill BSc (Hons) MLPI CIIP PhD

Objectives: Cyber-crime is a serious threat to the security and integrity of financial data and transactions. Accountants need to be aware of the risks and challenges posed by cyber criminals, and how to prevent, detect and respond to cyber-attacks. This session will provide an overview of the types, methods, and motivations of cyber-crime, as well as the best practices and tools for protecting financial information and systems in line with current data protection legislation.

You will learn how to identify and assess cyber vulnerabilities, how to implement effective cyber security policies and procedures, and how to report and recover from cyber incidents. The session will include practical examples (relevant to small accountancy practices) of good and bad practice, the issues that can arise and how they are overcome giving you a better understanding of the data protection and cyber landscape and how to safeguard your financial data from cyber threats.

Who should attend: Everyone! Data protection is everyone's responsibility.

Topics:

- Explore the current cyber-attacks in 2023 and beyond!
- Concerns with remote technology, AI and ransomware
- Recognise your organisation's responsibilities for data protection
- GDPR UK & the Data Protection Act 2018
- Identify the safeguards required to protect your data (Principle 6)
- Data security & the proposed Data Protection and Digital Information Bill
- Creating a secure culture – IT governance and controls

Speaker: Dr Stephen Hill is the managing director of Hill Bingham Ltd specialising in online investigations, cybercrime and data protection and compliance. Stephen spent many years working for a top firm of chartered accountants heading the Fraud and Forensic Group, leading an expert body advising clients on prevention, detection and recovery of fraudulent assets, working closely with organisations in both the public and private sector. He spent over 12 years a Trustee Director of the Fraud Advisory Panel and chaired the Panel's Cybercrime Working Group and continues as an adviser to the board. He is also an honorary member on the steering committee of the London Fraud Forum and is a committee member of the Association of Certified Fraud Examiners UK Chapter.

With an appointment as a Volunteer to the City of London Police Economic Crime Directive, Stephen assists fraud investigators with the aid of online investigation techniques and speaks at schools on the dangers of the Internet in line with his role as a safeguarding and child protection governor at his local primary school.

AM	Waiting Room: **09:00**	Course starts: **09:30**	Break: **11:00**	Course ends: **12:30**

Live Online		
Thursday 6 June	Live online using Zoom	CODE: JN06A4

WHY POWER QUERY IS THE MOST IMPORTANT EXCEL DEVELOPMENT EVER - EVEN IF YOU DON'T WORK WITH DATA!

Speaker: Simon Hurst BA ACA

Objectives: To enable attendees to use the Excel Power Query tools to make their use of Excel more reliable, more efficient and more automatic.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Who should benefit: Anyone whose use of Excel goes beyond the basics and ventures into the use of lookups and conditional sums. Anyone who works with external data or data stored in Excel worksheets and hasn't yet explored the Power Query tools in detail. Even if you don't work with external data, this course should help you to create spreadsheets that are more reliable and more automatic.

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical /information-technology/excel/spreadsheet-competency-framework.

Topics:

- An introduction to the Power Query/Get & Transform tools
- Power Query techniques that make Excel more dynamic and automatic
- VLOOKUP() RIP – why Power Query replaces all Excel lookup functions
- Think in more dimensions – escape the cell straitjacket
- Use Power Query to solve the insoluble
- Using Power Query to replace PivotTables
- Troubleshooting Power Query problems
- Case study – one-click management accounts: complete automation with Power Query

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX01A4

SPECIALIST

GOOD SPREADSHEET PRACTICE: EXCEL FUNDAMENTALS

Speaker: Simon Hurst BA ACA

Our special New Employee Word & Excel Productivity Courses Bundle makes this Excel course available, together with 'Essential Word Productivity Skills and Techniques for Accountants' (page 80), at a combined fee of £100+VAT (half the standard fee).

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 course seeks to cover that attendees have at least the required level of knowledge and competence.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Who should attend: This course is aimed at new or existing users of Excel who wish 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 course 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 on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

This course 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.

Topics:

- 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, and why Dynamic Arrays change everything you thought you knew about Excel formulae
- Function fundamentals: What functions are and how to use them safely. Key functions SUM(), IF(), SUMIFS(), XLOOKUP()
- Effective formatting: cell formats, Styles, number and date formats, Conditional Formats, Charts and graphics
- Fundamental features: working with data, PivotTables, 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

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX02A4

USING THE LATEST VERSIONS OF EXCEL TO REVOLUTIONISE YOUR SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: Since the introduction of Office 365, significant Excel changes and enhancements have been delivered as frequently as monthly. The increased number of updates makes it increasingly easy to miss a change that could have the potential to dramatically improve your use of Excel. This course covers the most significant changes after the initial introduction of Excel 2016. If you are upgrading from an earlier version, we will also include a PDF detailing the changes from 2007 up to Excel 2016.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Who will benefit: Users of Microsoft Excel that haven't yet upgraded to the latest version and are wondering whether they should. Users of Microsoft Excel that have recently upgraded and want to make sure they're getting the most out of the new version. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

This course is suitable for all levels under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/technical/technology/excel/spreadsheet-competency-framework.

Topics: will include:

- Why VLOOKUP() is now an X function – a new better, safer, cleverer and easier way to create lookups in Excel
- Dynamic arrays – use one formula to populate hundreds of cells dynamically. One of the most significant structural changes ever made to the way that Excel works and one that can also affect existing workbooks, plus it comes with more than a dozen new functions
- New functions, including supercharging IF()
- Maps and funnels – new chart types since Excel 2016
- New data types – stocks, geography and currencies
- Office Scripts – a new alternative to macros for automating spreadsheets
- The Excel BI revolution – from spreadsheet to Business Intelligence engine. Where most of the Excel update effort is going
- Because of the way that Excel is now being continually updated, there are likely to be further significant changes between the production of this overview and the date of the course
- It's AI(l) Over Now – how Microsoft's use of AI will do all the work for you…

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX03A4

50 ADVANCED TECHNIQUES FOR CREATING INSPIRATIONAL SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: The course is designed to address some more advanced Excel features and capabilities that will be of use to those working with financial data. Some significant new features in recent versions of Excel will be covered, but most of the course will be relevant to users of any Excel version. The intention is to cover areas that provide real practical benefits including making spreadsheets more automatic, more reliable and also increasing their impact through improved presentation.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

The examples are based on the latest version of Excel but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Who will benefit: The course will assume a familiarity with some Excel subjects, e.g.:
- Absolute and relative cell references
- Excel functions such as IF(), VLOOKUP() and XLOOKUP(), SUMIF()
- Basic chart creation
- Basic PivotTables

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework. Previous attendance on any existing SESCA Excel courses, or other similar courses, should provide adequate preparation for this course. If you already use complex financial functions, understand array formulae, make extensive use Excel form tools including PivotTables and write or edit VBA code then the course may well be of limited benefit to you.

Topics:
- Advanced use of functions – including using apparently simple functions to save hours of manual effort
- Excel formulae and techniques – including the revolutionary Dynamic Array formulae and advanced aspects of range names
- Macros, Visual Basic and Office Scripts. Creating user-defined functions, editing and writing macros and Office Scripts. Increasing interactivity and automating spreadsheets
- Data analysis tools – working efficiently with external data and using extended data tools and PivotTable features
- Superpower functions – the functions with hidden powers that can revolutionise your use of Excel
- Presentation – improving general spreadsheet presentation and making charts better. Using the latest Excel graphics features to create inspirational spreadsheets
- How Power Query changes everything. Excel without formulae

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX04A4

MORE POWER TO YOUR PIVOT: PRACTICAL USES FOR EXCEL PIVOT TABLES

Speaker: Simon Hurst BA ACA

Objectives: PivotTables are one of Excel's most powerful features, but they seem to divide Excel users into fanatical advocates and those who just don't see the point. This course will explain how PivotTables can be useful to almost any Excel user. Starting with the basics of using a simple PivotTable to summarise financial data it will show how PivotTables can simplify a range of practical Excel tasks from identifying best-selling products to consolidating branch data and acting as the engine for an automated performance dashboard. The course will also introduce some of the other key Excel features for working with, and presenting, data.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided, together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Who will benefit: If your use of Excel includes summarising, analysing, auditing and reporting on any form of financial data you should find this course of value.

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- Introduction to PivotTables - from raw data to your top ten products in 5 minutes with no formulae
- Dealing with data - different ways of getting at your data and keeping it updated automatically. Consolidating data from different parts of your organisation
- Manipulating PivotTables - sorting, filtering, grouping and formatting
- Advanced techniques - ad hoc grouping, adding formulae and working with values
- PivotTable as report engine - using a PivotTable to automate the production of management reports
- Using a PivotTable to create an automated performance dashboard
- Latest PivotTable developments - conditional formatting, Excel 2010 slicers. PowerPivot, 3D Map, Power BI and Power Query (now known as 'Get & Transform' from Excel 2016) - possibly the most significant Microsoft Office development of the millennium?

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX05A4

ESSENTIAL WORD PRODUCTIVITY SKILLS AND TECHNIQUES FOR ACCOUNTANTS

Speaker: Simon Hurst BA ACA

Our special New Employee Word & Excel Productivity Courses Bundle makes this Word course available, together with 'Good Spreadsheet Practice: Excel Fundamentals' (page 76), at a combined fee of £100+VAT (half the standard fee).

Objectives: Many of us will end up wasting at least 1.3 year's worth of our working lives through inefficient use of Microsoft Word*. Investing a morning in taking this course will help you to use Word far more efficiently and show you the best ways to address relevant issues, such as dealing with columns of figures and making document formatting quick and consistent.

* Completely spurious statistic, made up on the spot (but probably an underestimate).

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Who should attend: This course is aimed at all Word users who wish to ensure that they possess the skills and knowledge required to use Word efficiently to deliver a high-quality result. It covers a range of skills and techniques of particular relevance to those working with financial information and producing professional documents.

No particular prior knowledge is required. Examples will be based on the latest version of Word but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Word for Windows rather than Word for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Topics:

- Using the Word interface to help you work more quickly
- Faster formatting for characters, paragraphs and professional business graphics
- Learn how to deal properly with widows and orphans
- Automating whole paragraphs of content with a few keystrokes
- The ten best ways to save time using Word
- From frustration to elation – automate list and paragraph numbering in Word
- Conquering columns using Word tables
- Recent Word improvements and developments

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £100+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: WD01A4

NEW EMPLOYEE WORD AND EXCEL PRODUCTIVITY COURSES BUNDLE

Speaker: Simon Hurst BA ACA

Objectives: Dramatically improve productivity by ensuring that all your employees have the key skills required to use Excel and Word efficiently and safely. Although most of us can use Excel and Word, there is a big difference between being able to use these applications and being able to use them efficiently. This bundle of two courses aims to help your entire team reach an excellent level of competence in just a few hours.

Excel Fundamentals provides a comprehensive grounding in the principles and techniques required to create reliable, robust spreadsheets quickly and efficiently with reference to the ICAEW 20 Principles for Good Spreadsheet Practice. The Word course recognises that everyone can use Word and concentrates on tips, shortcuts and techniques useful to those working with financial data.

Online courses: We moved to providing IT courses online out of necessity, but they have proved extremely popular and we have found that they offer some significant advantages over live courses. Both courses are delivered using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work, together with some feedback from earlier online courses, are available on the back inside cover.

Who should attend: New employees or existing employees who feel that they could benefit from ensuring they have an adequate knowledge of how to use Excel and Word safely and efficiently. No particular prior knowledge is required. Examples will be based on a recent version of Office and but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Office for Windows rather than Office for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Key Topics:
Excel
- 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, and why Dynamic Arrays change everything you thought you knew about Excel formulae
- Function fundamentals: What functions are and how to use them safely. Key functions: SUM(), IF(), SUMIFS(), XLOOKUP()
- Fundamental features: working with data, PivotTables, 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

Word
- Faster formatting for characters, paragraphs and professional business graphics
- Automating whole paragraphs of content with a few keystrokes
- The ten best ways to save time using Word
- Conquering columns using Word tables
- Recent Word improvements and developments

Fuller details of the individual courses can be found on pages 76 and 80.

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for this bundle of 2 courses is £100+VAT (2 for the price of 1) (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	Bundle of two 3 hour recorded online courses accessed via the SESCA website	Code: WE02A4

2024 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
2024	Ethics: Practising Professionalism	J.Williams	All	W	ANY	67
2024	Ethics: Ethical Decision Making	J.Williams	All	W	ANY	68
2024	Why Power Query is the Most Important Excel Development Ever - Even if You Don't Work with Data!	S.Hurst	All	W	ANY	75
2024	Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	All	W	ANY	76
2024	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	All	W	ANY	77
2024	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	All	W	ANY	78
2024	More Power to Your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	All	W	ANY	79
2024	Essential Word Productivity Skills and Techniques for Accountants	S.Hurst	All	W	ANY	80
2024	New Employee Word & Excel Productivity Courses Bundle	S.Hurst	All	W	ANY	81
28 Feb	Hot Topics in VAT	N.Owen	All	O	AM	34
28 Feb	Complete Guide to Tax Planning for Small Businesses	M.Ward	All	O	PM	11
05 Mar	PAYE and National Insurance Update	A.Durrant	All	O	AM	12
05 Mar	A Practical Approach to Forms P11D	A.Durrant	All	O	PM	13
06 Mar	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	All	O	AM	51
06 Mar	Pensions - What the Accountant Needs to Know	M.Ingles	All	O	PM	25
07 Mar	Hot Topics in International Tax	J.Mindell	All	O	AM	21
12 Mar	Introduction to Housing Association Accounts and Audit	P.Herbert	All	O	AM	60
12 Mar	Capital Gains Tax for Owner Managed Businesses	M.Ward	All	O	PM	28
13 Mar	A Practical Approach to Forms P11D	A.Durrant	All	O	AM	13
13 Mar	PAYE and National Insurance Update	A.Durrant	All	O	PM	12
14 Mar	Companies Act Refresher	J.Selwood	All	O	AM	54
14 Mar	Introduction to Pension Scheme Accounts	P.Herbert	All	O	PM	58
19 Mar	Introduction to Charity Accounts	P.Herbert	All	O	AM	57
20 Mar	SRA Accounts Rules Annual Update	J.Taylor	All	O	AM	53
20 Mar	Businesses in Trouble - Helping Your Client in Times of Crisis	P.Ridgway	All	O	PM	71
21 Mar	Complete Guide to International VAT Issues	N.Owen	All	O	DAY	35
17 Apr	Tales of the Unexpected: VAT Case Studies with Outcomes Good and Bad	N.Owen	All	O	AM	39
17 Apr	HMRC Investigations	J.Mindell	All	O	PM	19
18 Apr	Employment and Business Law Update	L.Dunford	All	O	AM	63
18 Apr	Topical Tax Issues for Owner Managed Businesses	M.Ward	All	O	PM	10
23 Apr	Corporation Tax Update	G.Mooney	All	O	AM	18

2024 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
24 Apr	Complete Guide to Acting for Small Businesses	M.Ingles	All	O	AM	24
24 Apr	Annual IFRS Update	G.Loveday	All	O	PM	47
25 Apr	Complete Guide to VAT and Property Transactions	N.Owen	All	O	AM	37
25 Apr	Effective Narrative Reporting	V.Steward	All	O	PM	48
01 May	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	All	O	AM	50
02 May	The Accountant on the Farm - A Comprehensive Review	D.Missen & G.Pilcher	All	O	AM	20
02 May	Tax Planning in Difficult Economic Times	G.Mooney	All	O	PM	17
08 May	Housing Associations Accounting and Audit Update	V.Steward	All	O	AM	61
08 May	VAT Pitfalls and Solutions	D.Wootten	All	O	PM	33
09 May	Half Yearly Taxation Update	G.Mooney	All	O	AM	7
09 May	Half Yearly Audit and Accounting Update	G.Loveday	All	O	PM	43
09 May	Half Yearly Accounting and Financial Reporting Update	G.Loveday	All	O	AM	44
09 May	Half Yearly Taxation Update	G.Mooney	All	O	PM	7
14 May	A Practical Tax Brush Up for Returners	R.Benneyworth	All	O	AM	9
14 May	A Practical Accounting Update for Returners	K.McCaffrey	All	O	PM	46
14 May	Capital Taxes Update	M.Ward	All	O	AM	29
20 May	Half Yearly Taxation Update for Accountants in Business	M.Ingles	All	O	AM	8
20 May	Half Yearly Accounting Update for Accountants in Business	G.Loveday	All	O	PM	45
21 May	Half Yearly Accounting Update for Accountants in Business	G.Loveday	SE	D	AM	45
21 May	Half Yearly Taxation Update for Accountants in Business	M.Ingles	SE	D	PM	8
22 May	Trusts: Update and Planning Using Client Case Studies	A.Fisher	All	O	AM	30
22 May	Essential Guide to Share and Business Valuations	D.Bowes	All	O	PM	69
23 May	Complete Guide to Tax and the Family	M.Ward	All	O	AM	23
23 May	Complete Guide to Essential VAT for Charities	N.Owen	All	O	PM	36
23 May	Topical Issues in Insolvency ●	Various	SE	D	DAY	87
04 Jun	Payroll Services for Clients: Practical Problems	A.Durrant	All	O	AM	14
04 Jun	Complete Guide to VAT in the Construction Industry	N.Owen	All	O	PM	38
05 Jun	Half Yearly Taxation Update	M.Ward	All	O	AM	7
05 Jun	Half Yearly Accounting and Financial Reporting Update	G.Loveday	All	O	PM	44
05 Jun	Half Yearly Audit and Accounting Update	G.Loveday	All	O	AM	43
05 Jun	Half Yearly Taxation Update	M.Ward	All	O	PM	7
06 Jun	Guarding the Ledger – Cyber Security and Data Protection	S.Hill	All	O	AM	74
06 Jun	Complete Guide to Partial Exemption and the Capital Goods Scheme	N.Owen	All	O	PM	40
10 Jun	Half Yearly Accounting and Financial Reporting Update	G.Loveday	SE	OM	AM	44
10 Jun	Half Yearly Taxation Update	M.Ward	SE	OM	PM	7

Date	Course	Speaker	Area	Venue	Time	Page
11 Jun	Half Yearly Taxation Update	G.Mooney	SO	P	AM	7
11 Jun	Half Yearly Audit and Accounting Update	G.Loveday	SO	P	PM	43
12 Jun	Charity Trusteeship: Getting it Right for Finance Professionals	C.D'cruz	All	O	AM	66
13 Jun	Half Yearly Taxation Update	M.Ward	All	O	AM	7
13 Jun	Half Yearly Audit and Accounting Update	G.Loveday	All	O	PM	43
13 Jun	Half Yearly Accounting and Financial Reporting Update	G.Loveday	All	O	AM	44
13 Jun	Half Yearly Taxation Update	M.Ward	All	O	PM	7
14 Jun	How to be an Effective Networker	T.Trevett	All	O	AM	72
19-21Jun	Tax Conference 2024 ●	Various	SE	KU	C	87
21 Jun	Tax Conference 2024 - Topical Tax Tips and Pitfalls *	G.Mooney	SE	KU	AM	41
25 Jun	Half Yearly Accounting Update for Accountants in Business	G.Loveday	SO	P	AM	45
25 Jun	Half Yearly Taxation Update for Accountants in Business	M.Ingles	SO	P	PM	8
26 Jun	Half Yearly Accounting Update for Accountants in Business	G.Loveday	TV	CB	AM	45
26 Jun	Half Yearly Taxation Update for Accountants in Business	M.Ingles	TV	CB	PM	8
27 Jun	Half Yearly Accounting Update for Accountants in Business	G.Loveday	All	O	AM	45
27 Jun	Half Yearly Taxation Update for Accountants in Business	M.Ingles	All	O	PM	8
02 Jul	Complete Guide to Acting for Small Businesses	M.Ingles	All	O	AM	24
02 Jul	Accounting for and Auditing Academy Schools	P.Herbert	All	O	PM	52
03 Jul	Complete Guide to Tax Planning for Small Businesses	M.Ward	All	O	AM	11
03 Jul	Construction Industry Tax Refresher	T.Palmer	All	O	PM	31
04 Jul	Dealing with Common Property Transactions	M.Ward	All	O	AM	32
10 Sep	Payroll Services for Clients - Practical Problems	A.Durrant	All	O	AM	14
11 Sep	Capital Gains Tax and Inheritance Tax Refresher	N.May	All	O	AM	27
12 Sep	Acting for Doctors Update	A.Leal	All	O	AM	26
12 Sep	Hot Topics in VAT	N.Owen	All	O	PM	34
12-13Sep	Insolvency Conference 2024 ●	Various	SE	RU	C	87
17 Sep	A Practical Accounting Update for Returners	K.McCaffrey	All	O	AM	46
17 Sep	A Practical Tax Brush Up for Returners	R.Benneyworth	All	O	PM	9
18 Sep	Essential Guide to Share and Business Valuations	D.Bowes	All	O	AM	69
18 Sep	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	All	O	PM	51
19 Sep	Topical Tax Issues for Owner Managed Businesses	M.Ward	All	O	AM	10
19 Sep	Trusts: Update and Planning Using Client Case Studies	A.Fisher	All	O	PM	30
24 Sep	Annual IFRS Update	G.Loveday	All	O	AM	47
25 Sep	Subjectivity and Scepticism - The Thinking Auditor's Guide	R.Tiffin	All	O	AM	55
25 Sep	Tax Planning in Difficult Economic Times	G.Mooney	All	O	AM	17

2024 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
25 Sep	Tales of the Unexpected: VAT Case Studies with Outcomes Good and Bad	N.Owen	All	O	PM	39
26 Sep	Charities Legal Update	C.D'cruz	All	O	AM	65
26 Sep	Charities Update	J.Rowe	All	O	PM	64
02 Oct	Pensions - What the Accountant Needs to Know	M.Ingles	All	O	AM	25
02 Oct	A Practical Approach to Forms P11D	A.Durrant	All	O	PM	13
03 Oct	A Practical Introduction to Payroll	A.Durrant	All	O	AM	15
03 Oct	Capital Taxes Update	M.Ward	All	O	PM	29
08 Oct	Corporation Tax Update	G.Mooney	All	O	AM	18
08 Oct	Construction Industry Tax Refresher	T.Palmer	All	O	PM	31
09 Oct	How to be Better Remembered, Referred and Recommended	M.Lee	All	O	AM	70
09 Oct	Employment and Business Law Update	L.Dunford	All	O	PM	63
10 Oct	Essential Guide to Tax Issues on Buying, Selling and Closing Down Businesses	K.Read	All	O	AM	22
10 Oct	Topical Audit Problems and Solutions	J.Selwood	All	O	PM	56
10 Oct	Topical Issues in Insolvency ●	Various	SE	D	DAY	87
11 Oct	Making Tax Digital Update	R.Benneyworth	All	O	AM	16
15 Oct	Charities Update	J.Rowe	All	O	AM	64
15 Oct	Charities Legal Update	C.D'cruz	All	O	PM	65
16 Oct	Problems Commonly Encountered Under IFRS and FRS 102 – and Solutions!	G.Loveday	All	O	AM	49
16 Oct	Complete Guide to VAT and Property Transactions	N.Owen	All	O	PM	37
17 Oct	Complete Guide to International VAT Issues	N.Owen	All	O	DAY	35
18 Oct	Pension Accounting, Audit and Regulatory Update	V.Steward	All	O	AM	59
05 Nov	Complete Guide to VAT in the Construction Industry	N.Owen	All	O	AM	38
05 Nov	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	All	O	PM	50
06 Nov	Capital Gains Tax for Owner Managed Businesses	M.Ward	All	O	AM	28
06 Nov	Complete Guide to Tax and the Family	M.Ward	All	O	PM	23
07 Nov	Making Tax Digital Update	R.Benneyworth	All	O	AM	16
07 Nov	Dealing with Common Property Transactions	M.Ward	All	O	PM	32
12 Nov	VAT Pitfalls and Solutions	D.Wootten	All	O	AM	33
12 Nov	Improve Your Communication Skills	T.Trevett	All	O	PM	73
14 Nov	Half Yearly Taxation Update	G.Mooney	All	O	AM	7
14 Nov	Half Yearly Audit and Accounting Update	G.Loveday	All	O	PM	43
14 Nov	Half Yearly Accounting and Financial Reporting Update	G.Loveday	All	O	AM	44
14 Nov	Half Yearly Taxation Update	G.Mooney	All	O	PM	7

2024 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
15 Nov	Effective Narrative Reporting	V.Steward	All	O	AM	48
19 Nov	Half Yearly Audit and Accounting Update	G.Loveday	SE	OM	AM	43
19 Nov	Half Yearly Taxation Update	M.Ward	SE	OM	PM	7
20 Nov	Half Yearly Accounting Update for Accountants in Business	G.Loveday	TV	CB	AM	45
20 Nov	Half Yearly Taxation Update for Accountants in Business	M.Ingles	TV	CB	PM	8
21 Nov	Half Yearly Accounting Update for Accountants in Business	G.Loveday	SO	P	AM	45
21 Nov	Half Yearly Taxation Update for Accountants in Business	M.Ingles	SO	P	PM	8
22 Nov	Half Yearly Accounting Update for Accountants in Business	G.Loveday	All	O	AM	45
22 Nov	Half Yearly Taxation Update for Accountants in Business	M.Ingles	All	O	PM	8
26 Nov	Half Yearly Taxation Update	M.Ward	All	O	AM	7
26 Nov	Half Yearly Accounting and Financial Update	G.Loveday	All	O	PM	44
26 Nov	Half Yearly Audit and Accounting Update	G.Loveday	All	O	AM	43
26 Nov	Half Yearly Taxation Update	M.Ward	All	O	PM	7
27 Nov	Half Yearly Taxation Update for Accountants in Business	M.Ingles	SE	D	AM	8
27 Nov	Half Yearly Accounting Update for Accountants in Business	G.Loveday	SE	D	PM	45
28 Nov	Half Yearly Taxation Update for Accountants in Business	M.Ingles	All	O	AM	8
28 Nov	Half Yearly Accounting Update for Accountants in Business	G.Loveday	All	O	PM	45
03 Dec	Half Yearly Accounting and Financial Update	G.Loveday	SO	P	AM	44
03 Dec	Half Yearly Taxation Update	N.May	SO	P	PM	7
05 Dec	Half Yearly Taxation Update	N.May	All	O	AM	7
05 Dec	Half Yearly Audit and Accounting Update	G.Loveday	All	O	PM	43
05 Dec	Half Yearly Accounting and Financial Update	G.Loveday	All	O	AM	44
05 Dec	Half Yearly Taxation Update	N.May	All	O	PM	7

KEY: ● **=** Events not available on the Flexiticket * **=** 09:15 – 12:30
AM = 09:30 – 12:30 **PM** = 13:30 – 16:30 **D =** Day course – timings vary – see individual course information
C = Residential conference - timings vary – see individual conference information

KEEP TRACK OF YOUR CPD

To help you keep your CPD records up to date we send to every delegate on the Flexiticket scheme an annual report in January, of courses attended in the previous 12 months. Reports can be requested at any time of the year, please email courses@sesca.co.uk or call 01737 223999.

VENUES

Set out below is information on all our venues.
Directions to all venues are available on the website **sesca.co.uk/venues**

South East		
Denbies Wine Estate	**D**	London Road, Dorking RH5 6AA Tel: 01306 876616
Orida Hotel Maidstone	**OM**	Bearsted Road, Maidstone, ME14 5AA Tel: 01622 734 322
University of Reading	**RU**	Whiteknights, PO Box 217, Reading, RG6 6AH Tel: 0118 378 5657
University of Kent	**KU**	Kent University, Canterbury, CT2 7LX Tel: 01227 828 000
Southern		
Portsmouth Marriott Hotel	**P**	Southampton Road, North Harbour, Portsmouth, PO6 4SH Tel: 02392 383 151
Thames Valley		
Coppid Beech Hotel	**CB**	John Nike Way, Binfield, Bracknell, RG12 8TF Tel: 01344 303 333
Online Courses		
Live Online	**O**	Live online using Zoom – delegates will be emailed the joining information two days before the course date
Recorded Online	**W**	Recorded course accessed via the website – delegates will be emailed the information needed to access the course

SESCA ANNUAL RESIDENTIAL TAX CONFERENCE
19–21 June
at the University of Kent, Canterbury

A two-and-a-half-day residential conference providing an intensive update on taxation for general practitioners as well as specialists and accountants in business.
£375+VAT, or £355+VAT if booked and paid for by 30 April 2024. (Accommodation not included)

SESCA ANNUAL RESIDENTIAL INSOLVENCY CONFERENCE
12-13 September
at the University of Reading

A value for money update over one and a half days, for Insolvency Practitioners covering a wide range of technical and professional issues.
£325+VAT, or £310+VAT if booked and paid for by 31 May 2024.
(Accommodation not included)

SESCA TOPICAL ISSUES IN INSOLVENCY SEMINARS
23 May and 10 October
at Denbies Wine Estate, Dorking

Spring and Autumn one day seminars providing technical and professional updating for Insolvency Practitioners and their senior staff on a range of topical issues.

£190+VAT per day, or book both days for £330+VAT.

SESCA COURSES: FACE-TO-FACE, LIVE ONLINE AND RECORDED ONLINE

Face-to-Face and Live Online Courses

SESCA Face-to-Face Courses: Our face-to-face courses are available for anyone to attend. Course materials are provided on the day. Our venues have excellent facilities and ample parking. Registration and coffee breaks are an ideal chance to network and meet new people, something that can't be replicated online. Reminders are emailed to delegates one week before the course date.

Live Online Courses: Our live online CPD courses are available for anyone to attend from the comfort of their laptop/pc. The courses are run using Zoom. During the course, questions can be asked via the chat box facility. Delegates will receive the same quality training with the convenience of not having to leave your desk!

Delegates are emailed the course materials in PDF format and a Zoom link two days before each course date. You may request a hard copy of any course materials by emailing info@sesca.co.uk.

Courses are available individually or may be booked using any Flexiticket.

Recorded Online Excel, Word and Ethics Courses

Recorded Online Ethics Courses: Both our one hour and two hour long Ethics courses are offered recorded online, available at any time. Email courses@sesca.co.uk to book your one year access. Delegates are emailed the course notes and slide pack in PDF format and a weblink with access code. You can watch the courses at your own pace and return to them as many times as you wish within the year. Both Ethics courses may be attended using 1 place on the Flexiticket in our Ethics bundle deal. Please see pages 67 & 68 for more information.

Recorded Online Excel and Word Courses: All our Excel and Word courses are offered as recorded online courses available at any time.

Each course is accompanied by a full set of notes and example Excel workbooks or Word files to enable you to work through the content at your own pace. You can pause, rewind and return to the recording as many times as you wish within the month. Delegates are emailed the course materials and weblink with one month access code. Courses are available individually or may be booked using any Flexiticket.

WHAT OUR CLIENTS SAY:

"Super as always, Giles. Really liking how interaction was encouraged throughout." – **Sara Berrington, Kumar Associates. Attended the Taxation Update presented by Giles Mooney.**

"The usual and now expected exceptional quality of this annual course continues. All developments during the year captured with high quality documentation...Will always recommend SESCA courses to my colleagues, and certainly those presented by Guy." – **Allan Grimes, DSTL. Attended the Annual IFRS Update presented by Guy Loveday.**

"Another great course by Martyn. Thank you and also to SESCA Admin..." **- Sue White, Veolia. Attended the Taxation Update for Accountants in Business presented by Martyn Ingles.**

"Well run and nice to achieve CPD in one big lump! – **Mark Fryza, Fryza Neicho Ltd. Attended the 2023 Annual Taxation Conference.**

"Another great tax conference" – **Sarah Adamson, Brightling & Co. Attended the 2023 Annual Taxation Conference.**

SESCA

Prices held again for 2024

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A subsidiary of South Eastern Society of Chartered Accountants Ltd

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