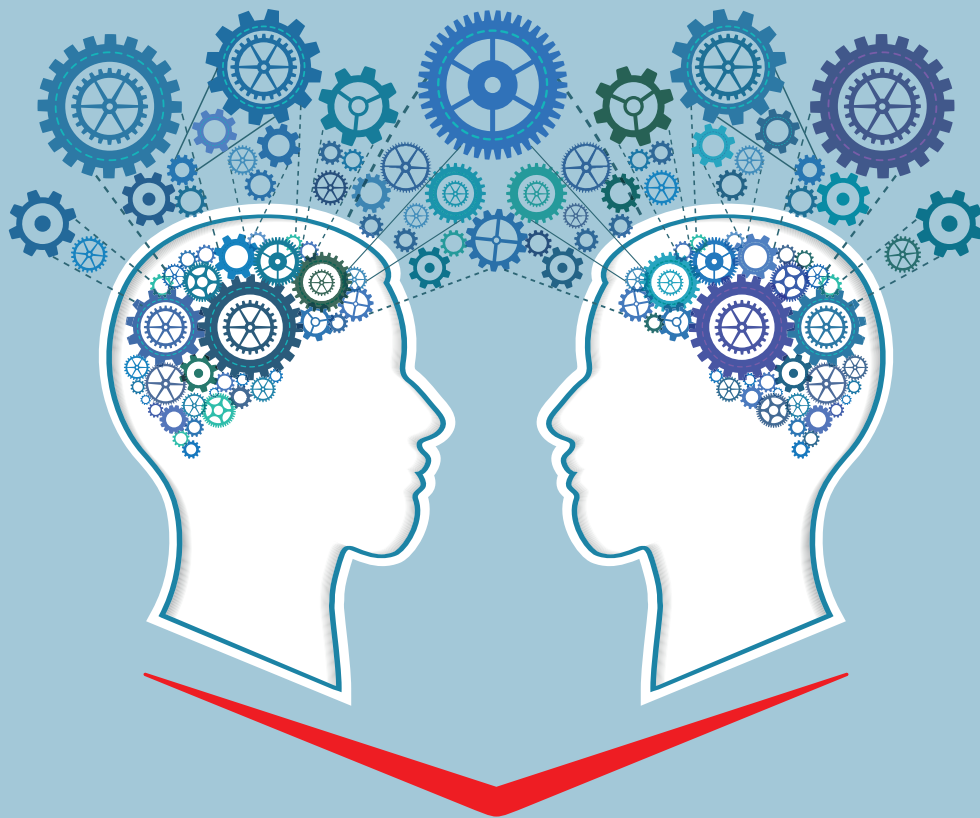




ICAEW
STAFFS, SALOP &
WOLVERHAMPTON



Lecture Programme
2018-2019

ICAEW

Staffs, Salop & Wolverhampton

Dear Colleague

2018-19 LECTURE PROGRAMME

Detailed within this booklet are:

- ICAEW Staffs, Salop and Wolverhampton lectures for October 2018 - May 2019
- CABA Workshops for 2018
- ICAEW Essentials Roadshows being planned for 2019

Details of the lectures and workshops can also be found at icaew.com/sswsca. Reminders will be sent to members in the West Midlands Stop Press email newsletter.

Again, we are offering you the opportunity to make a block booking of the tax, practice or business lectures. If you book all 5 in the series you can take advantage of the series discount. The discount does not apply to mixing and matching between the tax, practice or business programmes.

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

PLEASE NOTE

If you have any general queries about the lectures or bookings please contact Linda Conway on 0121 270 8942 or email linda.conway@icaew.com

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

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

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

Commercial and business lectures - Alison Ollier - Alison_Ollier@rcomext.com

Best Wishes

James Eyre-Walker

SSWSCA Courses & Conferences Chairman

Fees and booking conditions

FEE STRUCTURE

- Block booking of one place on all five tax, practice or business lectures £239 + VAT (block booking discount does not apply if mixing and matching between the tax, practice and business courses).
- Individual lectures £63 + VAT.
- CABA workshops £10 + VAT. (No charge to unemployed members.)
- ICAEW Essentials Roadshows ticket price to be confirmed.
- Reduced rates for unemployed members, please contact Linda Conway 0121 270 8942 for details.

DAYS AND TIMES

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

BOOKINGS

- Online - to book your place online and pay by credit/debit card go to <https://events.icaew.com/> and enter West Midlands in the regions box.
- Post - complete the application form at the back of this booklet and return with a cheque to ICAEW West Midlands, P.O. Box 15206, Halesowen B62 2GH.
- Places will be allocated on a first come first served basis. Priority will be given to those who have block booked.
- There is no guarantee that late bookings will be accepted.

VENUE

The Moat House Hotel, Lower Penkridge Road, Acton Trussell, Staffordshire ST17 0RJ
T: 01785 712217 E: info@moathouse.co.uk

CANCELLATIONS AND LATE BOOKINGS

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

CHANGES TO THE PROGRAMME

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

Tax programme

TL01/18 - Making Tax Digital - Rebecca Benneyworth Tuesday 23 October 2018 (14:00 - 17:00)

AIMS AND OBJECTIVES

To update participants on the current proposals under Making Tax Digital. To explain in detail the requirements for VAT under MTD. To identify appropriate advice for clients affected by VAT mandation.

CONTENT

• MTD: Principals and Objectives • Specific requirements for VAT • Appropriate digital record keeping solutions • Joining the VAT Pilot • Implementation for other taxes

TARGET AUDIENCE

Staff who will have responsibility for implementing MTD for VAT, and those providing support to clients.

TL02/18 - Capital Gains Tax and planning for disposals - Ros Martin Tuesday 20 November 2018 (14:00 - 17:00)

AIMS AND OBJECTIVES

The course will cover all aspects of capital gains tax relating to the disposals of both business and personal assets. It will focus on areas where planning would benefit the position of the vendor.

CONTENT

• The tax treatment of different types of consideration • Disposal of businesses and securing entrepreneurs relief • Disposal of the private residence: pitfalls and opportunities
• Disposal of assets to connected parties • Apportionment of consideration in complex transactions
• Allowability of expenditure

TARGET AUDIENCE

This course will provide a comprehensive update on all aspects of capital gains tax by focussing on the disposal of business and personal assets and is aimed at all those practitioners who are advising clients in this area.

TL03/19 - Finance Bill - Mark Ward Tuesday 19 February 2019 (14:00 - 17:00)

AIMS AND OBJECTIVES

This course will familiarise participants with the provisions of the current Finance Bill. All of the major changes in the Finance Bill will be explained, in the context of the clients whose affairs will be affected. Identified planning areas and pitfalls will be covered. Other current developments in taxation as they affect practitioners and their clients may also be included, depending on the significance and relevance of the Finance Bill.

CONTENT

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

TARGET AUDIENCE

All levels of staff dealing with tax issues.

TL04/19 - Tax strategies for OMBs - Rebecca Benneyworth

Tuesday 5 March 2019 (14:00 - 17:00)

AIMS AND OBJECTIVES

This session will highlight the key areas of advice for small businesses, whether incorporated or unincorporated. For Limited companies, profit extraction methods will be examined in detail, including the availability of reliefs on cessation of the business.

CONTENT

- Is Incorporation still good tax advice?
- Other tax mitigation techniques for the self employed
- Profit extraction: salary, dividends, tax efficient benefits, interest
- Striking off or liquidation: what are the tax rules?
- Other consideration for company directors: pension, minimum wage, company cars etc.

TARGET AUDIENCE

Any professionals with a good basic understanding of tax issues, who aim to bring their knowledge up to date.

TL05/19 - Inheritance Tax update - Amanda Fisher

Tuesday 14 May 2019 (14:00 - 17:00)

AIMS AND OBJECTIVES

This course will act as an update and refresher on some important inheritance tax matters. Consideration will also be given to inheritance tax (IHT) planning and ways to reduce our clients' exposure to inheritance tax.

CONTENT

- Recent IHT updates and developments, including relevant cases
- IHT planning to minimise potential IHT liabilities - maximising reliefs and exemptions
- IHT for the family home and other property
- IHT and the family business
- Using trusts for inheritance tax purposes
- Numerous examples and illustrations to ensure this is a practical and informative course

TARGET AUDIENCE

The course will benefit practitioners who would like to update their IHT knowledge and increase their opportunities for advising clients on how to minimise their current and potential inheritance tax liabilities.

Practice programme

PL01/18 - GDPR - implementation issues - Andy Larkum
Tuesday 6 November 2018 (14:00-17:00)

This course is also part of the business programme.

AIMS AND OBJECTIVES

To address some of the common challenges faced by accountants with respect to the General Data Protection Regulations.

CONTENT

After the flurry of activity in the first 5 months of the year, this session explores what practical difference the GDPR should be making in our lives, and in our daily practice. By the end of the session, you should have a better understanding of:

- What the GDPR set out to achieve
- The fundamentals of the GDPR
- How the GDPR should have affected your business practices
- Some of the key challenges and their potential solutions
- What questions you should be able to answer
- What documentation you should have compiled

TARGET AUDIENCE

Partners, Directors, Senior Managers and Compliance Officers.

PL02/19 - Legal update - Louise Dunford
Thursday 7 February 2019 (14:00-17:00)

This course is also part of the business programme.

AIMS AND OBJECTIVES

To familiarise accountants with the most recent developments in company, business and employment law relevant to their SME clients and their practice.

CONTENT

- Company law update on Directors duties
- Shareholder, minority protection
- Sale of a business, TUPE developments
- Partnership update
- GDPR - where are we now?
- Employment status, particularly extension of IR35
- Payroll issues including sick pay, holiday pay and minimum wage

TARGET AUDIENCE

All accountants at every level working in a professional practice serving small and medium sized clients, accountants working in a small and medium sized company.

PL03/19 - Audit and financial reporting update - Guy Loveday
Tuesday 12 February 2019 (14:00-17:00)

AIMS AND OBJECTIVES

The course will update members in practice concerning the improvements and clarifications to FRS 102 and the legal changes to FRS 105.

Many companies have failed to transition fully to FRS 102. Many small companies are filing accounts where profit privacy is breached.

CONTENT

- The four main accounting changes to FRS 102
- Worked example of tax advantageous fair value accounting for financial instruments
- Revised disclosure requirements of FRS 102 and FRS 105
- Latest guidance on disclosure of transactions between small companies and their directors
- ICAEW audit monitoring feedback concerning compliance with FRS 102 including transitional issues

TARGET AUDIENCE

Members in practice involved in the preparation and/or audit of accounts prepared in accordance with FRS 102 - including Section 1A and FRS 105.

PL04/19 - Share and business valuations - Jenny Nelder Tuesday 26 March 2019 (14:00 - 17:00)

AIMS AND OBJECTIVES

To provide an understanding of the fundamental concepts of valuation, issues arising, the differences in approach for tax and other purposes and how to minimise your risk .

CONTENT

- Valuation principles and methodologies
- Factors affecting valuation
- The role of the valuer
- Approaches to giving advice to minimise risk
- Valuing different sizes of shareholdings
- The difference between valuation for commercial and fiscal purposes
- Principles from statute and case law, for tax and other valuations
- Valuations for tax purposes: - Negotiating with HMRC - shares and assets valuation - The information standard - Valuation of employment related securities - Valuing shares at 31 March 1982 or other base dates - Goodwill

TARGET AUDIENCE

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 sales and purchases, disputes, tax, employee share awards, incorporation, divorce and other.

PL05/19 - Excel: More Power to your Pivot - practical uses of Excel PivotTables and Power Tools - Simon Hurst Tuesday 21 May 2019 (14:00-17:00)

This course is also part of the business programme.

AIMS AND 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. We will also look at how the most recent Excel Power Tools are changing the way we all use spreadsheets .

CONTENT

- 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, Power View, Power Map and Power Query (now known as 'Get & Transform' in Excel 2016) - possibly the most significant Microsoft Office development of the millennium? Please note this is not a 'hands-on' course, but will provide practical advice, demonstrated through examples and with comprehensive documentation. The Examples will be based on Excel 2016 but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course.

TARGET AUDIENCE

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

Commercial and business programme

CBL01/18 - Tax update for accountants in business (including VAT)
Ros Martin - Thursday 4 October 2018 (15:00 - 18:00)

AIMS AND OBJECTIVES

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

CONTENT

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

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

TARGET AUDIENCE

The course will be relevant to those who are working in business rather than practice but will be relevant to all who want a general update of current issues.

CBL02/18 - GDPR - implementation issues - Andy Larkum
Tuesday 6 November 2018 (14:00-17:00)

This course is also part of the practice programme, see the practice programme for more details.

CBL03/19 - Legal update - Louise Dunford
Thursday 7 February 2019 (14:00-17:00)

This course is also part of the practice programme, see the practice programme for more details.

CBL04/19 - Employment taxes and staff incentives - Jeremy Mindell
Thursday 4 April 2019 (15:00-18:00)

AIMS AND OBJECTIVES

To update participants on the changes in employment taxes and the tax treatment of incentives. The course reviews what incentives are becoming more tax efficient and which are becoming more costly. It will also look at changes in law as well as recent tax cases that have affected employment taxes.

CONTENTS

- New rules for cars
- Salary sacrifice and optional remuneration
- Termination payments—the latest squeeze
- Employment status HMRC wins and loses
- Tax free benefits—good to go?

TARGET AUDIENCE

Any professional who advises on employment taxes, remuneration planning and status issues.

**CBL05/19 - Excel: More Power to your Pivot - practical uses of Excel
PivotTables and Power tools - Simon Hurst**
Tuesday 21 May 2019 (14:00-17:00)

This course is also part of the practice programme, see the practice programme for more details.

In partnership with



with you for life

ICAEW Staffs, Salop and Wolverhampton presents a series of evening workshops in partnership with CABA.

TIMING:

17:00-17:30 Registration and light buffet.

17:30-20:30 Workshop.

**CABA01/18 - Returning to work with confidence - Jenni Rose
Wednesday 17 October 2018 (17:30-20:30)**

Having a break from working life can leave us feeling we lack the confidence to return to work. Our own thought patterns and feelings of fear and anxiety can make the process even more difficult. This session will help participants overcome these challenges. With a focus on overcoming negative thinking and practical tips to boost their confidence, they will develop the skills to make returning to work a smooth process.

KEY OUTCOMES

- Explore the thoughts and feelings experienced when returning to work after a period of absence
- Know how to deal with negative thoughts
- Identify some strategies of how to minimise fears and manage anxiety
- Recognise the importance of acknowledging themselves and what they have to do to build self-esteem and confidence

**CABA02/18 - Mental Health Awareness - Rachel Wesley
Wednesday 21 November 2018 (17:30-20:30)**

With one in four people experiencing a mental health problem at some stage in their life, it is important we educate ourselves on the effect mental health brings and how we can support those with mental health problems. This workshop aims to raise awareness and understanding of the most common mental health disorders. It highlights important information on how stress impacts on mental health, dispels some of the misconceptions frequently linked with mental health issues and offers a range of practical strategies to support others.

KEY OUTCOMES

- Have an understanding of the most common mental health disorders
- Recognise early signs and symptoms
- Use practical tools and strategies to support themselves and others

**CABA03/18 - Career Mapping: take charge of your career - Cath Heath
Tuesday 4 December 2018 (17:30-20:30)**

Research has identified four key competencies which make up career adaptability: concern for the future, control, curiosity and confidence. Each of us has different strengths and our own unique blend of these four attributes. By developing their career adaptability, participants can learn to use each competency effectively, so that they can have the career and future they want. This workshop will help participants understand their strengths in these four areas and identify how they can develop them to have the career they want to have.

KEY OUTCOMES

- Set goals for the career they want to have
- Identify strategies to help them take control of their career
- Be alert to different and emerging opportunities
- Increase confidence in their ability to achieve



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ICAEW Essentials Roadshows

Developed by ICAEW Faculty experts and delivered by the leading trainers in their field, our Essentials Roadshow courses will equip participants with practical advice on the latest developments and current issues across **financial reporting, practice** and **business**.

After attending, participants will be able to immediately practice the key takeaways, helping them to become more effective in their role as well as give better advice to their clients or stakeholders.

Our half-day courses will be bookable in August 2018. Please indicate on the application form if you require more information.

Prices range from £60 - £100 tbc (depending on your membership or the number of tickets you buy).

AVAILABLE COURSES

Accounting for 'small' entities (FRS 105, 102 (1a)) - practical issues

This course looks at common issues that have arisen since the adoption of FRS 105 and FRS 102 and looks at practical ways of dealing with them, including key accounting differences, filing and disclosure issues and any pending changes.

The practice of today - opportunity and risk

As technological trends continue to impact practices, this course will look at the market drivers shaping today's firms and will focus on the opportunities they present as well as the risks of not seizing those opportunities.

Simplifying, streamlining and bringing financial information to life

This course will show participants effective ways to maximise their impact by simplifying management Information (MI), using MI to influence, and creating opportunities to maximise engagement. Participants will be introduced to techniques to prepare and deliver financial information in reports, meetings and presentations.

Translating technical know-how into effective business partnering

With most organisations recognising the need for Finance to be business partners, this course explores how Finance can move from being 'bean counters, information providers and transaction processors' to 'professional advisors' a department of problem solvers who can guide the business to make sound financial decisions.

Programme 2018-19

APPLICATION FORM

Tax

PLACE(S)	REF	TITLE	DATE
	BLOCK	All five tax lectures	
	TL01/18	Making tax digital	Tues 23 October 18
	TL02/18	CGT and planning for disposals	Tues 20 November 18
	TL03/19	Finance Bill	Tues 19 February 19
	TL04/19	Tax strategies for OMBs	Tues 5 March 19
	TL05/19	IHT update	Tues 14 May 19

Practice

PLACE(S)	REF	TITLE	DATE
	BLOCK	All five practice lectures	
	PL01/18	GDPR - implementation issues *	Tues 6 November 18
	PL02/19	Legal update *	Thurs 7 February 19
	PL03/19	Audit and financial reporting update	Tues 12 February 19
	PL04/19	Share and business valuations	Tues 26 March 19
	PL05/19	Excel *	Tues 21 May 19

Commercial and Business

PLACE(S)	REF	TITLE	DATE
	BLOCK	All five commercial and business lectures	
	CBL01/18	Tax update for accountants in business	Thurs 4 October 18
	CBL02/18	GDPR - implementation issues *	Tues 6 November 18
	CBL03/19	Legal update *	Thurs 7 February 19
	CBL04/19	Employment taxes and staff incentives	Thurs 4 April 19
	CBL05/19	Excel *	Tues 21 May 19

* Same course in the practice and business programmes

CABA Workshops

PLACE(S)	REF	TITLE	DATE
	CABA01/18	Returning to work with confidence	Wed 17 October 18
	CABA02/18	Mental Health Awareness	Wed 21 November 18
	CABA03/18	Career Mapping: take charge of your career	Tues 4 December 18

ICAEW Essentials Roadshows

Send booking details when available (please tick)	
<input type="checkbox"/>	Accounting for 'small' entities (FRS 105, 102 (1a)) - practical issues
<input type="checkbox"/>	The practice of today - opportunity and risk
<input type="checkbox"/>	Simplifying, streamlining and bringing financial information to life
<input type="checkbox"/>	Translating technical know-how into effective business partnering

FEE STRUCTURE

- SSWSCA lecture block booking £239 + £47.80 VAT - one place on all five Tax, Practice or Business series (mixing and matching of any of the three series of lectures is not allowed)
- Single SSWSCA lecture £63.00 + £12.60 VAT
- Single CABA workshop £10.00 + £2.00 VAT (No charge for unemployed members)
- ICAEW Essentials Roadshows ticket price to be confirmed

To book your place go to **events.icaew.com/** and enter West Midlands in the regions box or complete both sides of the form and return this application form to:

ICAEW West Midlands
P O Box 15206
Halesowen B62 2GH

Alternatively, email linda.conway@icaew.com or call Linda Conway on 0121 270 8942.

PLEASE COMPLETE AND RETURN

NAME OF CONTACT:		
NAME(S) OF DELEGATE(S):		MEMBERSHIP NO: (If applicable)
FIRM/COMPANY:		
ADDRESS:		
TELEPHONE:		
EMAIL:		

PAYMENT BY CHEQUE

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

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

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

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