



ICAEW
CROYDON



2020 Essentials CPD

PREMIUM CPD DELIVERED LOCALLY

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‘This was probably the most effective course I have ever attended in my almost 50 years as a member of ICAEW.’

2019 DELEGATE FEEDBACK

‘It was excellent. The clearest and most focused address of the issue I have attended so far.’

2019 DELEGATE FEEDBACK

Introduction

I am delighted to welcome you to the ICAEW Croydon Continuing Professional Development (CPD) Programme. We are committed to delivering CPD that will support local members at all career stages.

ICAEW Croydon represents over 2,500 ICAEW members living and working in the local area. It connects members with their representatives within ICAEW and with each other. It promotes the interests of members, providing services to them and enabling them to better serve the community and the public interest.

Our new CPD programme will provide you with the technical expertise to keep you ahead, maintaining your reputation for quality work and reinforcing your commitment to professional and ethical standards. We aim to deliver:

- high quality, topical content, designed by leading subject matter experts to fulfil your core CPD requirements;
- engaging seminars with interactive Q&A sessions;
- essential technical know-how across a wide variety of subjects, enabling you to be more effective in your role;
- opportunities to network with like-minded individuals in your area;
- control over your personal development and wellbeing, and the ability to support your teams with our series of CABA workshops; and
- greater value for our members with bulk booking options.

Providing our own CPD, with the support of ICAEW, gives us the agility to react to local demand and changing needs coupled with the quality and reliability you expect.

Our new CPD programme is designed to help you maximise your own potential and help your team to fulfil theirs. I hope you take full advantage of the seminars and workshops on offer.



Tom Ahmad
President, ICAEW Croydon

Contents

COURSE PRICING	3
EVENT BOOKING	3
TAX	4
AUDIT AND ASSURANCE	9
ACCOUNTING	11
LEGAL	18
BUSINESS MANAGEMENT	20
PRACTICE MANAGEMENT	23
VENUE DETAILS	27
COURSE DATES OVERVIEW	28

Pricing

PROFESSIONAL DEVELOPMENT SEMINARS:

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

The discounts shown are applied at the time of booking and are valid for individuals booking more than one seminar at a time, or corporate bookings where more than one delegate from the same organisation is booked onto the same seminar.



ON-DEMAND WEBINARS

£50 + VAT

WELLBEING AND PERSONAL DEVELOPMENT WORKSHOPS

All courses in the personal development section are delivered by CABA and are therefore free of charge.

WANT A COURSE ON A DIFFERENT TOPIC?

Our nationwide CPD Essentials programme gives you access to high quality training anywhere in the UK. For a full list of locations, dates and topics, visit [icaew.com/essentialscpd](https://www.icaew.com/essentialscpd)

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ONLINE: [icaew.com/croydoncpd](https://www.icaew.com/croydoncpd)

EMAIL: events@icaew.com

PHONE: +44 (0)1908 248 159

Tax updates

Key speakers

REBECCA BENNEYWORTH MBE, BSC, FCA

Rebecca is an ICAEW Chartered Accountant with over 35 years' experience in practice. She is a writer and consultant on a variety of taxes, and lectures throughout the UK to professionals.

She works closely with HMRC on the Making Tax Digital project; and is chair of the Digital Advisory Group. Rebecca is a past chair of the ICAEW Tax Faculty, and was named Best Tax Lecturer at the Lexis Nexis Taxation Awards.

Rebecca was awarded an MBE for services to the tax profession in 2012. She will lead our tax programme supported by a team of industry experts.

‘Really excellent. Translated the complex and dry tax laws into easily understandable sections. Very engaging and clear. I would definitely attend more lectures/updates.’

Tax updates

Practical implications of the Finance Act 2020

TARGET AUDIENCE: PRACTICE

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 12 May

This course will cover developments in the most recent Finance Act, focusing on those issues most important for the smaller practice and their clients. The impact of changes on previous advice and any likely changes which might be necessary will be identified and suitable solutions suggested for any practical issues that may arise from the legislative changes.

KEY OUTCOMES

- Knowledge of the content of the Finance Act 2020
- Awareness of appropriate advice arising from the changes

SUITABLE FOR

Finance professionals advising smaller businesses.

PAYE NIC update, including comprehensive review of off-payroll working

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 20 Apr

This course will provide updates on key changes in PAYE and NIC including employment tax and taxation of benefits in kind. It will focus on identifying the practical steps that advisers can take to ensure that they remain compliant. Payroll administrative process changes will also be covered, including a comprehensive review of off-payroll working.

KEY OUTCOMES

- An understanding of key updates in the areas of PAYE & NIC
- A comprehensive review of off-payroll working including a reminder of the year-end process
- A refresher of the changes to anti-avoidance legislation

SUITABLE FOR

Finance professionals working in practice or business.

Tax updates

VAT update and review of tricky areas

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 20 Apr

This course will focus on any recent developments in VAT, highlighting and explaining any changes and important case decisions. The course will also highlight the current state of plans (if any) for a post-Brexit value added tax and examine some of the perennial difficult areas in VAT, such as VAT on construction and the supply of property, transfer of going concern rules, and the option to tax.

KEY OUTCOMES

- Knowledge of any VAT changes in the last 12-18 months
- Understanding of some of the more complex areas of VAT, and where problems may arise
- Clarity on the implications of MTD for VAT for businesses

SUITABLE FOR

Finance professionals working in practice or business.

Corporation tax refresher and update

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 22 Oct

This course provides an opportunity to update and refresh your knowledge on corporate tax issues, looking at the slightly larger business which may have some more complex corporation tax issues such as transfer pricing, loan relationships, loss capping etc. The precise content will be determined by the hottest topics in corporate tax at the time of the seminar.

KEY OUTCOMES

- An understanding of some of the more complex areas of corporation tax
- A refresher on specific corporation tax issues

SUITABLE FOR

Finance professionals working in practice or business.

Tax updates

Tax planning for the smaller business

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 17 Sep

This course will focus on tax planning for the smaller business, highlighting and explaining any changes with relation to income tax, corporation tax and capital gains tax. It will also aim to identify opportunities where your advice to clients will enable them to minimise tax liabilities.

KEY OUTCOMES

- Clarity on IR35

SUITABLE FOR

Finance professionals working in or advising smaller businesses.

Autumn tax update

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 22 Oct

This course will include an update on tax changes since the Finance Act, and possibly any Budget content that has been announced (assuming that the Budget remains an autumn event). It will also examine some of the future proposals in tax, identifying situations where your advice to clients may have to change.

KEY OUTCOMES

- An awareness of imminent tax changes and when they are likely to be introduced

SUITABLE FOR

Finance professionals working in practice or business.

Tax updates

Personal tax update

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 12 May

This course will cover changes in personal tax over the last 12 to 18 months, covering the following tax areas:

- Personal income tax
- Capital gains tax
- Inheritance tax
- Residence and domicile developments; offshore issues
- The taxation of savings including pensions
- Personal digital tax account developments
- HMRC processes including simple assessment

KEY OUTCOMES

- Knowledge of recent changes in personal tax
- Awareness of important advice points for personal tax clients

SUITABLE FOR

Finance professionals working in practice or business.

Tax planning for the family: marriage, separation & divorce

NEW
FOR
2020

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 17 Sep

This course will cover tax planning issues that arise within the whole family including, but not limited to, tax implications of marriage, separation and divorce. This course will highlight appropriate advice for clients and look at effective tax strategies in relation to the whole family unit.

KEY OUTCOMES

- Understanding of tax planning in relation to marriage, separation and divorce
- Knowledge of effective tax strategies in relation to children
- An understanding of anti-avoidance issues

SUITABLE FOR

Finance professionals advising business owners and their families.

Audit and Assurance courses

Key speakers

PETER HERBERT FCA

Peter is an ICAEW Chartered Accountant with a professional practice background and 20 years' training experience. He specialises in financial reporting, auditing and company law, as well as commercial awareness and business skills. Peter is a founding director of Insight Training. He has a small practice, providing advice to mid-tier and small accountancy practices on aspects of accounting, auditing and practice regulation.

ANDREW MEAD

Andrew is an independent consultant specialising in accounting advice and financial reporting. He is experienced in UK GAAP and IFRS, as well as having over 20 year audit experience, working as an Audit Director at KPMG for a number of years. He is also an experienced presenter and has delivered financial reporting training to many organisations in the UK and overseas.

JOHN SELWOOD ACA

John is an ICAEW chartered accountant and independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on financial reporting, auditing, money laundering and company law. John is a member of ICAEW's Audit and Assurance Faculty's Practitioner Services Panel Committee and has been involved with presenting and writing the material for the Audit and Assurance and Financial Reporting Faculties Roadshows for a number of years. He also regularly writes for *Audit & Beyond* and is the author of *Core Auditing Standards for Practitioners*.

Audit and Assurance courses

Audit and Assurance update (Spring)

TARGET AUDIENCE: PRACTICE

DURATION: 3 HOURS

LOCATION AND DATE:

Novotel Hammersmith, 12 May
Chartered Accountants' Hall, London, 18 May
Chartered Accountants' Hall, London, 8 Jun
20 Cavendish Square, London, 16 Jun

The course covers all of the latest developments in auditing and assurance. Using practical examples and ICAEW Audit & Assurance Faculty expertise, the update helps auditors comply with the latest requirements effectively and efficiently.

KEY OUTCOMES

This is a topical course and the content will vary depending on current developments. The course may cover:

- Updated ISAs such as ISA 540 Accounting estimates
- The changes to the audit profession resulting from the Kingman and CMA reviews
- Other hot topics such as auditor reporting, auditor independence, scepticism, the auditor and fraud
- New ICAEW or regulator guidance, including charities, LLPs and pension scheme audits

SUITABLE FOR

Finance professionals involved in audits.

Audit and Assurance update (Autumn)

TARGET AUDIENCE: PRACTICE

DURATION: 3 HOURS

LOCATION AND DATE:

20 Cavendish Square, London, 30 Sep
Novotel Hammersmith, 1 Oct
Chartered Accountants' Hall, London, 2 Nov
Chartered Accountants' Hall, London, 2 Dec

The course covers all of the latest developments in auditing and assurance. Using practical examples and ICAEW Audit & Assurance Faculty expertise, the update helps auditors comply with the latest requirements effectively and efficiently.

KEY OUTCOMES

This is a topical course and the content will vary depending on current developments. The course may cover:

- Updated and new ISAs
- Changes to auditor independence, audit regulation and relevant legislation
- Other hot topics
- New ICAEW or regulator guidance, including the audit of Public Interest Entities

SUITABLE FOR

Finance professionals involved in audits.

Accounting updates

Key speakers

PETER HERBERT FCA

Peter is an ICAEW Chartered Accountant with a professional practice background and 20 years' training experience. He specialises in financial reporting, auditing and company law, as well as commercial awareness and business skills. Peter is a founding director of Insight Training. He has a small practice, providing advice to mid-tier and small accountancy practices on aspects of accounting, auditing and practice regulation.

SALLY KNIGHT FCA

Sally is an ICAEW Chartered Accountant, with longstanding experience of advising on charity accounting, reporting and governance matters. She was one of the first professional advisers to achieve ICAEW's Diploma in Charity Accounting (DChA). For many years, Sally acted as external audit and advisory partner for a variety of not-for-profit organisations. She now runs her own consultancy business specialising in tailored support and training for charity trustees, finance staff and volunteers.

ANDREW MEAD

Andrew is an independent consultant specialising in accounting advice and financial reporting. He is experienced in UK GAAP and IFRS, as well as having over 20 year audit experience, working as an Audit Director at KPMG for a number of years. He is also an experienced presenter and has delivered financial reporting training to many organisations in the UK and overseas.

VIVEK MEHAN FCA

Vivek is an ICAEW Chartered Accountant and independent training and financial reporting consultant with 20 years' experience in professional training and development. He has worked with a wide range of organisations both in practice and business, ranging from large FTSE100 multinationals to owner-managed companies and the public sector. Vivek has particular expertise in financial reporting including UK GAAP, US GAAP and IFRS as well as finance for non-finance training.

Accounting updates

Accounting/Financial reporting update (Spring)

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 23 Jun

The course provides an update on UK GAAP for all entities, using material prepared in conjunction with the ICAEW Financial Reporting Faculty. It will also include an update on IFRS.

Using examples and case studies, this course will take a practical look at the opportunities and pitfalls of recent changes in accounting or other topical areas.

KEY OUTCOMES

This is a topical course and the content will vary depending on current developments. The course may cover:

- Case studies to demonstrate the application of the March 2018 version of FRS 102, for periods commencing 1 January 2019
- Accounting of intangibles and the outcome of the FRC's consultation
- A review of changes to directors' reports and strategic reports
- Topical accounting problems
- Changes to IFRS 16 Leasing and brief review of the financial statements of early adopters

SUITABLE FOR

All accountants preparing accounts using UK GAAP.

Accounting/Financial reporting update (Autumn)

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 5 Oct

The course provides an update on UK GAAP for all entities, using material prepared in conjunction with the ICAEW Financial Reporting Faculty. It will also include an update on IFRS.

Using examples and case studies, this course will take a practical look at the opportunities and pitfalls of recent changes in accounting or other topical areas.

KEY OUTCOMES

This is a topical course and the content will vary depending on current developments. The course may cover:

- Proposals for further changes to FRS 102 including accounting for leases, revenue recognition and financial instruments
- Changes to relevant legislation, ethical requirements and ICAEW guidance
- Topical accounting problems
- A review of the changes to revenue recognition resulting from the application of IFRS 15

SUITABLE FOR

All accountants preparing accounts using UK GAAP.

Accounting updates

Charity Accounting and Governance update

TARGET AUDIENCE: PRACTICE

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 3 Jun

Covers developments in charity accounting, reporting and governance which are relevant for charity auditors and independent examiners. A topical course, drawing on practical examples and recent reports, particularly from charity regulators, so content will vary according to the latest developments.

KEY OUTCOMES

- Charity sector context and reminder of current regulatory framework
- Impact of recent Charity Commission investigations and monitoring work
- Reporting matters of material significance
- Update on charity audit and independent examination regime
- Charity accounting challenges
- Charity SORP development
- Current thinking on charity governance - challenges and opportunities
- Effective risk management and fraud awareness for charities Finance professionals working in or advising charities

SUITABLE FOR

Finance professionals working in or advising charities.

Common accounting problems

NEW
FOR
2020

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 3 Jun

Using feedback and resources from ICAEW's Technical Enquiries Service, this session looks at accounting problem areas in FRS 102, FRS 105 and the Companies Act. Using examples and case studies the session will show you how to get it right.

KEY OUTCOMES

- Common problems when accounting in deferred tax, intangibles, share capital, property plant and equipment, provisions, foreign currency
- How to avoid pitfalls when looking at eligibility for small company exemptions and other Companies Act issues
- How to get presentation and disclosure right for micro, small, medium sized and large companies

SUITABLE FOR

Finance professionals working in practice or business.

Accounting updates

IFRS update



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

Over recent years IFRS has been through a number of significant developments. We've now had to adapt to major changes in how organisations account for important accounting areas.

With the clear strategy of UK GAAP to remain aligned with IFRS it is also an opportunity to stay ahead of the curve and be aware of changes that may impact on UK GAAP entities (which will help with forward planning).

KEY OUTCOMES

- Significant 'new' standards implemented in 2018 and 2019 ie, Revenue (IFRS 15), Financial Instruments (IFRS 9) and Leases (IFRS 16)
- How these standards were implemented and what challenges they brought with them
- Other IFRS developments
- Other proposed IFRS developments

SUITABLE FOR

Finance professionals working in practice or business who report using IFRS.

Transactions between a company and its directors



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

The correct accounting treatment and disclosures of transactions with directors remains a difficult area, particularly in light of changes made in FRS 102.

KEY OUTCOMES

- Disclosure and legality of transactions with directors
- FRS 102 - accounting treatment of loans including the tax implications and disclosure issues
- Company law refresher, including directors loans, share issues

SUITABLE FOR

Finance professionals working in practice or business.

Accounting updates

Accounting for LLPs



TARGET AUDIENCE: PRACTICE

WEBINAR DURATION: 1 HOUR

This webinar covers all of the latest developments and is a refresher on hot topics. It is designed for everyone who is involved in preparing financial statements for LLPs.

The course considers LLPs adopting FRS 102, including small LLPs and LLPs using the micro entity framework.

KEY OUTCOMES

- The LLP SORP, including updates from the triennial review
- Important accounting topics, including members' loans, presentation as debt or equity, members' remuneration
- Getting presentation and disclosure right
- Overview of the regulatory framework
- Accounting for LLPs using FRS 105 and the micro entity framework

SUITABLE FOR

Anyone who is involved in preparing financial statements for LLPs.

Accounting for academies



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

This webinar covers all of the latest developments and is a refresher on hot topics. It is designed for everyone who is involved in preparing financial statements or auditing academy schools.

KEY OUTCOMES

- Changes in the latest Academies Handbook and Academies Accounts Direction
- Relevant changes in FRS 102 and the Charity SORP
- A refresher on the regulatory framework
- Other hot topics

SUITABLE FOR

Anyone who is involved in preparing financial statements or auditing academy schools.

Accounting updates

Accounting and auditing for property companies



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

This webinar looks at the accounting and auditing issues specific to property investment companies and developers.

KEY OUTCOMES

Accounting topics:

- Mixed use properties
- Transfer of properties
- Properties in a group situation
- Deferred tax on revaluations
- Accounting for inventories in developers
- Accounting for construction contracts
- Leasing under FRS 102

Auditing topics:

- Auditing accounting estimates
- Materiality in property company audit
- Bank confirmations
- Property managers - dealing with service organisations
- Addressing fraud risk

SUITABLE FOR

Finance professionals working in or advising property investment companies and developers.

Accounting and auditing for charities



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

This webinar is an update and refresher on charity accounting and auditing.

KEY OUTCOMES

Accounting topics:

- Hot topics in the Charity SORP and changes resulting from the triennial review of FRS 102
- Trustees' annual reports
- Recent Charity Commission guidance
- Whistleblowing requirements
- A refresher on the regulatory framework

Auditing topics:

- A refresher on audit exemption and independent examination thresholds
- Obtaining sufficient audit evidence on investments
- Materiality in charity audits
- Peculiarities of charity audit reports
- The auditor's responsibilities in relation to the trustees annual report
- The directions for independent examiners

SUITABLE FOR

Finance professionals working in or advising charities.

Accounting updates

Accounting standards – the tax impact



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

This webinar is for both accountants and tax specialists and considers the tax issues around preparing incorporated and unincorporated business accounts in light of the changes in UK GAAP over the past few years.

KEY OUTCOMES

- A refresher on exactly how the numbers in the financial statements lead to the tax position
- Directors' and group loans
- What information has to be provided to HMRC on small companies
- FRS 105 and its tax impact
- Leasing
- Intangibles
- Provisions including dilapidations
- Foreign currency transactions and forward contracts
- Deferred tax

SUITABLE FOR

Finance professionals working in practice or business.

WANT A COURSE ON A DIFFERENT TOPIC?

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Legal

Key speaker

PETER HERBERT FCA

Peter is an ICAEW Chartered Accountant with a professional practice background and 20 years' training experience. He specialises in financial reporting, auditing and company law, as well as commercial awareness and business skills. Peter is a founding director of Insight Training. He has a small practice, providing advice to mid-tier and small accountancy practices on aspects of accounting, auditing and practice regulation.

Legal

Anti-money laundering update

NEW
FOR
2020

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 5 Oct

The anti-money laundering rules are complex so this course will help firms in their compliance of this critically important area.

This is an update and refresher for all levels.

KEY OUTCOMES

- The recent changes in 2018 to the Money Laundering Regulations
- Current ICAEW guidance
- Identification of clients
- The risk-based approach to client due diligence
- When to report suspicions of money laundering including practical examples
- Bribery

SUITABLE FOR

Finance professionals working in practice or business.

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Business management skills

Key speakers

JEREMY LEWIS MSC, FCA

A Fellow of ICAEW, Jeremy is an organisation development consultant, coach and supervisor.

Jeremy specialises in creative leadership development and collaborative strategic partnering, and has worked with top team and individual executives across the public, private and third sectors for over 10 years. Before establishing his own practice, Jeremy worked as an internal and external consultant with KPMG, Capita, Mercer and Lloyds Banking Group and was the OD practice director at the Institute for Organisational Development.

‘Excellent course and pitched at just the right level for accountants in practice in our sector.’

2019 DELEGATE

Business management skills

The power of communication – effective conversations

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 24 Nov

We explore the perception and reality of good communication so we can make a compelling point and engage others quickly. The course is practical, full of tips to help participants feel better equipped to communicate with impact and test if people understand.

KEY OUTCOMES

- Identifying what good looks like
- Preparing your approach and setting the scene
- Getting the body language and tone right
- Clarify what you want and why it matters
- Seeking a common understanding and acknowledging differences
- Actively listening and flexing your style
- Asking powerful questions

SUITABLE FOR

Finance professionals working in practice or business.

The impact of digital technologies: Part 1



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

There is a lot of talk about 'digital' and its disruptive impact across sectors and industries but why does it matter and how will it impact our profession and your role? This two-part webinar will explore how digital is likely to change the role of the finance function as well as the finance professional. The webinars will look at each of the technologies through the lens of finance and cover the skills and behaviours that will be required to succeed in the digital age.

KEY OUTCOMES

- The impact of digital technology at a macro (industry) level
- Key drivers of the digital agenda in finance: Explosive growth in data and exponential advancements in technology
- What digital technologies are impacting finance?
- How will this change the role of the finance function?
- Digital technologies in detail (part 1): Robotic process automation, cognitive technologies

SUITABLE FOR

Finance professionals who want to gain a concise overview of the relevance and impact of digital technologies on finance.

Business management skills

The impact of digital technologies: Part 2



TARGET AUDIENCE: PRACTICE/BUSINESS

WEBINAR DURATION: 1 HOUR

There is a lot of talk about 'digital' and its disruptive impact across sectors and industries but why does it matter and how will it impact our profession and your role? This two-part webinar will explore how digital is likely to change the role of the finance function as well as the finance professional. The webinars will look at each of the technologies through the lens of finance and cover the skills and behaviours that will be required to succeed in the digital age.

KEY OUTCOMES

- The changing role of the finance function: digital as a key enabler for finance
- From 'operator' to 'catalyst and strategist'
- Digital technologies in detail (part 2): Blockchain, advanced analytics and visualisation tools
- Skills and behaviours to succeed in the digital age
- How to acquire these skills
- How to get started with digital

SUITABLE FOR

Finance professionals who want to gain a concise overview of the relevance and impact of digital technologies on finance.

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Practice management

Key speakers

MATT FLANAGAN

Matt is a cloud business systems specialist, working in close partnership with forward thinking accountants to support their transition to cloud accounting & developing relevant advisory services. Matt's background was 15 years in enterprise IT delivery on HMRC & NHS platforms, leaving the corporate world in 2012 and has been working in the cloud accounting sphere since 2014. More recently having lead BlueHub as one of the leading App Integrators and also founded The Appacus Community for Accounting & Bookkeeping firms who want to properly adopt whilst taking advantage of what the Apps can offer both their firms and their clients. Matt has been monitoring and commentating on the 1st phase of Making Tax Digital (MTD) and accounting firm's digital transition since 2016.

‘Very up to date and brilliantly presented with lots of examples.’

2019 DELEGATE

Practice management

Creating a digital practice

TARGET AUDIENCE: PRACTICE

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 24 Nov

For principals in accountancy firms looking to adapt their business model to take advantage of opportunities presented by developments in digital technologies. It will include sessions on connecting your clients, using digital tools to drive practice efficiency, and the various apps that are available and how to choose the best ones for your business.

KEY OUTCOMES

- How to evolve your existing cloud-based packages
- Drive efficiency via systems, apps and bank feeds
- Connecting your clients to the new digital capabilities
- Engaging your staff

SUITABLE FOR

The course will be most relevant for firms already on their journey to drive practice efficiency and increase client engagement.

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Wellbeing & Personal Development

Introduction



CABA is the charity providing lifelong support to past and present ICAEW members and their families. CABA's aim is to enable individuals in the chartered accountant community to promote their own wellbeing – physically, emotionally, financially and professionally.

Since they were founded in 1886 the services they provide have grown significantly to meet the changing needs of living in a modern digital age. And although CABA works closely with ICAEW, it is an independent organisation and they do not share information with ICAEW about the people they work with. All the services that CABA provides – including these training courses – are free.

All CABA trainers are experts in their specialism and courses are delivered by experienced, qualified trainers. Many trainers have a background in professional services and some are qualified accountants, so they understand the environment accountants work in and appreciate the pressures you face day to day.

The courses are practical, providing evidence-based tools, techniques and strategies that you can take away to use in your personal and professional life. In addition, the courses are an opportunity to network with others who are facing similar issues or situations and share ideas and resources.

You will learn the skills that fall outside of technical training – like being able to respond confidently to change and how to deal with pressure; skills that can determine your success and put you a step ahead of the competition.

Testimonials

‘(The) course provided great practical tips that can be applied with immediate effect in my day-to-day role, thank you.’

‘I don’t think I’m overstating things when I say that the CABA courses I attended had a profound effect on me. Not only did they change my attitude to my work, they genuinely made me feel better about my life too.’

‘Techniques to help me be more positive and resist my negative thoughts. Really practical help and supporting evidence.’

Wellbeing & Personal Development

Do more in a day than you do in a week

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Chartered Accountants' Hall, London, 5 Jun
Croydon Park Hotel, 5 Nov

Being effective is a crucial aspect of our wellbeing. It gives us a sense of achievement, autonomy, certainty, purpose and control, and this, in turn, leaves us more fulfilled and motivated to do more.

This workshop is devoted to reviewing what individuals do – their goals and priorities, how they do them, their strategies, and their relationship to them. It covers some of the latest thinking and practical productivity hacks, leaving you with the capacity to focus your mind, define what's important to you and get in the flow.

KEY OUTCOMES

- Recognising priorities and increasing effectiveness
- Using productivity hacks to help transform an individual's effectiveness
- Dealing with external distractions and procrastination

SUITABLE FOR

Anyone who would like to be more effective at work.

Persuasion and influencing skills

TARGET AUDIENCE: PRACTICE/BUSINESS

DURATION: 3 HOURS

LOCATION AND DATE:

Croydon Park Hotel, 23 Jun
Chartered Accountants' Hall, London, 1 Dec

This workshop explores more effective ways to persuade people and discover the behaviours that create influence. It's essential if you want to get yourself heard, create a more positive first impression and communicate more confidently.

KEY OUTCOMES

- Identifying the difference between influence and persuasion
- Understanding the theory of reciprocity and how to use it
- Communicating in a more assertive, win-win, manner
- Learning how to use various questioning techniques

SUITABLE FOR

Anyone who would like to develop their skills, improve their confidence, become more influential and persuasive in the workplace.

Venue details

CHARTERED ACCOUNTANTS' HALL

One Moorgate Place
London,
EC2R 6EA

Closest underground station:
Bank/Liverpool Street/Moorgate

CROYDON PARK HOTEL

7 Altyre Road
Croydon,
CR9 5AA

Closest train station:
East Croydon

NOVOTEL LONDON WEST

1 Shortlands
Hammersmith
W6 8DR

Closest underground station:
Hammersmith

ROYAL COLLEGE OF NURSING

20 Cavendish Square
London
W1G 0RN

Closest underground station:
Oxford Circus/Bond Street

2020 course dates overview

Course	Chartered Accountants' Hall	Croydon Park Hotel	Novotel London West	Royal College of Nursing	Page
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Tax

Practical implications of the Finance Act 2020	-	12 May	-	-	5
PAYE NIC update, including comprehensive review of off-payroll working	-	20 Apr	-	-	5
VAT update and review of tricky areas	-	20 Apr	-	-	6
Corporation tax refresher and update	-	22 Oct	-	-	6
Tax planning for the smaller business	-	17 Sep	-	-	7
Autumn tax update	-	22 Oct	-	-	7
Personal tax update	-	12 May	-	-	8
Tax planning for the family: marriage, separation & divorce	-	17 Sep	-	-	8

Course	Chartered Accountants' Hall	Croydon Park Hotel	Novotel London West	Royal College of Nursing	Page
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Audit and assurance

Audit and Assurance update (Spring)	18 May 8 Jun	-	12 May	16 Jun	10
Audit and Assurance update (Autumn)	2 Nov 2 Dec	-	1 Oct	30 Sep	10

Accounting

Accounting/Financial reporting update (Spring)	-	23 Jun	-	-	12
Accounting/Financial reporting update (Autumn)	-	5 Oct	-	-	12
Charity Accounting and Governance update	-	3 Jun	-	-	13
Common accounting problems	-	3 Jun	-	-	13

Legal

Anti-money laundering update	-	5 Oct	-	-	19
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Course	Chartered Accountants' Hall	Croydon Park Hotel	Novotel London West	Royal College of Nursing	Page
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Business management skills

The power of communication - effective conversations	-	24 Nov	-	-	21
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Practice management

Creating a digital practice	-	24 Nov	-	-	24
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Wellbeing & Personal Development

Do more in a day than you do in a week	5 Jun	5 Nov	-	-	26
Persuasion and influencing skills	1 Dec	23 Jun	-	-	26

On demand Webinars



Accounting

IFRS update	On-demand webinar available as of Jan 2020	14
Transactions between a company and its directors	On-demand webinar available as of Jan 2020	14
Accounting for LLPs	On-demand webinar available as of Jan 2020	15
Accounting for academies	On-demand webinar available as of Jan 2020	15
Accounting and auditing for property companies	On-demand webinar available as of Jan 2020	16
Accounting and auditing for charities	On-demand webinar available as of Jan 2020	16
Accounting standards – the tax impact	On-demand webinar available as of Jan 2020	17

Business management skills

The impact of digital technologies: Part 1	On-demand webinar available as of Jan 2020	21
The impact of digital technologies: Part 2	On-demand webinar available as of Jan 2020	22

‘I wanted to learn how to bring my financial information to life. I learnt how to tell the story. The content was very interesting and presented in an engaging way’

2019 DELEGATE FEEDBACK

*‘Very up to date and
brilliantly presented
with lots of examples.’*

2019 DELEGATE FEEDBACK

There are over 1.8m chartered accountants and students around the world – talented, ethical and committed professionals who use their expertise to ensure we have a successful and sustainable future.

Over 181,500 of these are ICAEW Chartered Accountants and students. We train, develop and support each one of them so that they have the knowledge and values to help build local and global economies that are sustainable, accountable and fair.

We've been at the heart of the accountancy profession since we were founded in 1880 to ensure trust in business. We share our knowledge and insight with governments, regulators and business leaders worldwide as we believe accountancy is a force for positive economic change across the world.

www.charteredaccountantsworldwide.com
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