



LONDON SOCIETY  
OF CHARTERED  
ACCOUNTANTS



# *2020 Essentials CPD*

PREMIUM CPD DELIVERED  
IN PARTNERSHIP WITH ICAEW

[icaew.com/loncpd](https://www.icaew.com/loncpd)

***‘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 London Society of Chartered Accountants Continuing Professional Development (CPD) programme. The London Society of Chartered Accountants is committed to delivering CPD that will support local members at all career stages.

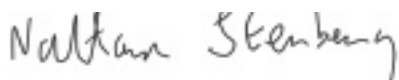
We represent over 35,000 members of ICAEW living and working in London. We connect members with their representatives within ICAEW and with each other and promote the interests of members, providing services to them and enabling them to better serve the community and the public interest.

Our new CPD programme will provide you with the technical expertise to keep you up to date, 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.



**Nathan Steinberg**

President, London Society of Chartered Accountants

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# 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)

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

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

**EMAIL:** [events@icaew.com](mailto:events@icaew.com)

**PHONE:** +44 (0)1908 248 159

# *Tax updates*

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## *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.’*

**2019 DELEGATE**

# Tax updates

## *Practical implications of the Finance Act 2020*

**TARGET AUDIENCE:** PRACTICE

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 27 Apr  
Novotel Hammersmith, 5 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 change.

### **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.

## *VAT update and review of tricky areas*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

20 Cavendish Square, 24 Jun  
Novotel Hammersmith, 30 Nov

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.

# *Tax updates*

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## *Corporation tax refresher and update*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Novotel Hammersmith, 5 May  
20 Cavendish Square, 24 Sep

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 planning for the smaller business*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 27 Apr  
20 Cavendish Square, 11 Nov

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.



# Tax updates

## *Autumn tax update*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

20 Cavendish Square, 24 Sep  
Novotel Hammersmith, 30 Nov  
Chartered Accountants' Hall, 7 Dec

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.

## *Personal tax update*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

20 Cavendish Square, 11 Nov  
Chartered Accountants' Hall, 7 Dec

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 updates

## *Tax planning for the family: marriage, separation & divorce*

NEW  
FOR  
2020

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 11 May  
20 Cavendish Square, 5 Oct

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.

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# Accounting updates

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## Key speakers

### 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.

### 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*.

### 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.

# Accounting updates

## *Accounting/Financial reporting update (spring)*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

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

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

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:**

20 Cavendish Square, 14 May  
Chartered Accountants' Hall, 9 Oct

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:**

20 Cavendish Square, 2 Jul  
Chartered Accountants' Hall, 13 Oct

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

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## *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.

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# *Audit and assurance courses*

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## *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*.

*'This was excellent - the best audit course I've ever been to.'*

**2019 DELEGATE**

# 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, 18 May  
Chartered Accountants' Hall, 8 Jun  
20 Cavendish Square, 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, 30 Sep  
Novotel Hammersmith, 1 Oct  
Chartered Accountants' Hall, 2 Nov  
Chartered Accountants' Hall, 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.

# *Practice management*

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## *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:**

Chartered Accountants' Hall, 5 Jun  
20 Cavendish Square, 24 Jun

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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# *Business management skills*

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## *Key speakers*

### **AMANDA CARLYLE BSc, MSc, ACMA, ABNLP**

Amanda is a CIMA qualified accountant with 24 years of experience in leading finance teams and delivering finance training. She has worked with some of the UK's leading professional training organisations, providing training to a wide range of organisations in both the public and private sectors. Amanda has shared her expertise in finance leadership, change management and bringing the numbers to life with thousands of delegates from a variety of industries and is now a lead finance trainer for the ICAEW Academy of Professional Development.

### **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.

### **SI HUSSAIN BSc(HONS), FCA, FHEA, PGCERT (HE)**

Si is an ICAEW qualified chartered accountant having qualified with KPMG in 1990. Over the past 25 years, Si has been an educator and facilitator and (executive) director of several listed companies including chief executive of BPP Professional Education. He is the author of *The Finance Book*, the bestselling accounting and corporate finance book (Amazon).

Si is a highly experienced facilitator and educator. He has numerous events for clients focusing on the impact of digital on finance. Recent sessions include exploring and exploiting digital technology opportunities within audit (Big Four firms), the 'digital finance skills agenda' (senior finance professionals from industry and practice) and understanding the impact that digital will have on the professional firms sector.

***‘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:**

Chartered Accountants' Hall, 16 Jun

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.

## *Implementing faster finance-led projects*

NEW  
FOR  
2020

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 20 Apr  
20 Cavendish Square, 24 Nov

Implementing change can be a complicated process and realising the benefits of change extremely challenging. This workshop provides a structured series of techniques to ensure transformation programmes, projects and change initiatives have a simple and flexible way of implementing fast and customer-led improvements.

### **KEY OUTCOMES**

- How to stop wasting time creating a 'perfect' plan
- What can we learn from agile methodologies
- Keeping your focus on the benefits
- How to engage people to implement change quicker
- Making projects visible and tangible
- The risks to watch out for

### **SUITABLE FOR**

Finance professionals working in business.

# *Business management skills*

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## *Business partnering for the finance professional*

**TARGET AUDIENCE:** BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 16 Jun  
20 Cavendish Square, 13 Oct

## *Commercial acumen for finance professionals*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

20 Cavendish Square, 24 Nov

There are growing expectations and demands on finance to show cost and change leadership. There's a common movement throughout the finance profession to move from a 'bean counting, information providing, transaction processing role' to an 'advisory and facilitating role' where finance staff are seen as the solution. This workshop explores what's needed to realise successful business partnering relationships across the business.

**KEY OUTCOMES**

- What does good business partnering look like?
- Creating relationships within the business
- How do customers define value?
- How to find out what's important to your customers
- Facilitating conversations
- Challenging business outcomes
- Creating opportunities to gather customer feedback
- Making it simple for others to engage with the technical process

**SUITABLE FOR**

Finance professionals working in business.

The course enables professionals to explore how they can apply commercial negotiation techniques to develop better relationships and drive performance. Participants will explore practical tools and techniques to initiate commercial discussions and speed up decision-making. There will be opportunity to practise the techniques in readiness to start negotiating as soon as you are back in the workplace.

**KEY OUTCOMES**

- Preparing for different scenarios to gain a win-win
- Using questions to find out what the other party values
- Communication techniques to build rapport and trust quicker
- Language and behaviours to create a positive experience
- Techniques to influence the right outcome
- Creating opportunities and choices
- Techniques to deal with misunderstandings and escalations

**SUITABLE FOR**

Finance professionals working in practice or business.



# *Business management skills*

## *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.

## *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.

# *Legal*

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## *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*



**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 23 Jun  
20 Cavendish Square, 13 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.

## 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](http://icaew.com/essentialscpd)

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

**ONLINE:**

[icaew.com/loncpd](http://icaew.com/loncpd)

**EMAIL:**

[events@icaew.com](mailto:events@icaew.com)

**PHONE:**

+44 (0)1908 248 159

# Wellbeing & Personal Development

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## 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.

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## 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, 5 Jun

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.

## *Better people management*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 30 Jun

Whether you manage staff formally or informally, this workshop provides an opportunity to consider different management styles and the impact these have on managing people. You will develop the skills needed to delegate confidently, learn how to give valuable instructions and the best way to provide constructive feedback.

### **KEY OUTCOMES**

- Considering your management style and how others perceive it
- Recognising the importance of delegation and how to do it well
- Understanding how to give constructive feedback
- Gaining tips on how to deal with difficult conversations with staff

### **SUITABLE FOR**

Anyone who directly or indirectly manages people.

# *Wellbeing & Personal Development*

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## *Persuasion and influencing skills*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 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.

## *Emotional intelligence in a digital world*



**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 13 Nov

Advances in technology are accelerating at unprecedented speed. To succeed in a fast-evolving digital age it is necessary to marshal the skills that computers cannot offer – creative problem-solving, emotional awareness and empathy. Together, we call this emotional intelligence.

This session focuses on the drivers of social behaviour and introduces a useful framework to help maintain the balance between technology and effective human interaction.

### **KEY OUTCOMES**

- Understand how digital helps and hinders us
- Learn about basic EI skills
- Leave with a practised, useful EI framework

### **SUITABLE FOR**

Anyone looking to understand how emotional intelligence can impact positively within a highly established and ever-changing digital world.

# Wellbeing & Personal Development

## *Unconscious bias: understanding and limiting its impact*



**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 15 May

If you have a brain, you have bias!

Research shows that creating more diverse workplaces improves employee recruitment, retention, increased market share and boosts creativity. But diversity is not only about the explicit discrimination that leads to racism and sexism. Biases impact all areas of our lives, not just the workplace. We are all biased, and to truly understand the risks is to understand what it is to be human.

### **KEY OUTCOMES**

- Understanding what is unconscious bias?
- Recognising and accepting our own unconscious biases
- Understanding the impact of unconscious bias and why it matters in life and the workplace
- An introduction to some ideas to help minimise our unconscious biases

### **SUITABLE FOR**

Anyone who would like to understand what unconscious bias is and learn effective techniques that will enable them to address their own unconscious biases, not just in the workplace but in everyday life.

## *Career mapping*

**TARGET AUDIENCE:** PRACTICE/BUSINESS

**DURATION:** 3 HOURS

**LOCATION AND DATE:**

Chartered Accountants' Hall, 21 Oct

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 your career adaptability, you can learn to use each competency effectively, so that you can have the career and future you want. This workshop will help you understand your strengths in these four areas and identify how you can develop them to have the career you want to have.

### **KEY OUTCOMES**

- The role of goal setting in helping to achieve a desired career
- Identifying strategies that help individuals to take control of their careers
- Being alert to different and emerging opportunities
- Recognising the key ingredients needed to help career development

### **SUITABLE FOR**

Anyone looking to develop and enhance their career and possibly seeking new opportunities.

***‘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.’***

**2019 DELEGATE FEEDBACK**



# *Venue details*

## **CHARTERED ACCOUNTANTS' HALL (CAH)**

Moorgate Place  
London  
EC2R 6EA

Closest underground station:  
Moorgate (Northern and Circle, Hammersmith & City and Metropolitan lines)

## **HOTEL NOVOTEL LONDON WEST**

Hammersmith International Ctre 1  
Shortlands,  
London W6 8DR

Closest station:  
Hammersmith ( Circle, District, Hammersmith & City and Piccadilly lines)

## **ROYAL COLLEGE OF NURSING**

20 Cavendish Square  
London  
W1G 0RN

Closest station:  
Bond Street (Jubilee and Central lines) or Oxford Circus (Victoria, Bakerloo and Central lines)

# *2020 course dates overview*

Course	Chartered Accountants' Hall	Novotel Hammersmith	20 Cavendish Square	Page
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## *Tax*

Practical implications of the Finance Act 2020	27 Apr	5 May	-	5
VAT update and review of tricky areas	-	30 Nov	24 Jun	5
Corporation tax refresher and update	-	5 May	24 Sep	6
Tax planning for the smaller business	27 Apr	-	11 Nov	6
Autumn tax update	7 Dec	30 Nov	24 Sep	7
Personal tax update	7 Dec	-	11 Nov	7
Tax planning for the family: marriage, separation	11 May	-	5 Oct	8

## *Accounting*

Accounting/Financial reporting update (spring)	18 May 8 Jun	12 May	16 Jun	10
Accounting/Financial reporting update (autumn)	2 Nov 2 Dec	1 Oct	30 Sep	10
Charity Accounting and governance update	9 Oct	-	14 May	11
Common accounting problems	13 Oct	-	2 Jul	11

Course	Chartered Accountants' Hall	Novotel Hammersmith	20 Cavendish Square	Page
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## *Audit and assurance*

Audit and Assurance update (spring)	18 May 8 Jun	12 May	16 Jun	17
Audit and Assurance update (autumn)	2 Nov 2 Dec	1 Oct	30 Sep	17

## *Practice management*

Creating a digital practice	5 Jun	-	24 Jun	19
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## *Business management skills*

The power of communication - effective conversations	16 Jun	-	-	21
Implementing faster finance-led projects	20 Apr	-	24 Nov	21
Business Partnering for the finance professional	16 Jun	-	13 Oct	22
Commercial acumen for finance professionals	-	-	24 Nov	22

Course	Chartered Accountants' Hall	Novotel Hammersmith	20 Cavendish Square	Page
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## *Legal*

Anti-money laundering update	23 Jun	-	13 Oct	25
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## *Wellbeing and personal development*

Do more in a day than you do in a week	5 Jun	-	-	27
Better people management	30 Jun	-	-	27
Persuasion and influencing skills	1 Dec	-	-	28
Emotional Intelligence in a digital world	13 Nov	-	-	28
Unconscious bias: Understanding and limiting its impact	15 May	-	-	29
Career mapping	21 Oct	-	-	29

# *On demand Webinars*



## *Accounting*

IFRS update	On Demand Webinar Available as of Jan 2020	12
Transactions between a company and its directors	On Demand Webinar Available as of Jan 2020	12
Accounting for LLPs	On Demand Webinar Available as of Jan 2020	13
Accounting for academies	On Demand Webinar Available as of Jan 2020	13
Accounting and auditing f or property companies	On Demand Webinar Available as of Jan 2020	14
Accounting and auditing for charities	On Demand Webinar Available as of Jan 2020	14
Accounting standards – the tax impact	On Demand Webinar Available as of Jan 2020	15

## *Business management skills*

The impact of digital technologies: Part 1	On Demand Webinar Available as of Jan 2020	23
The impact of digital technologies: Part 2	On Demand Webinar Available as of Jan 2020	23

***‘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.




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[www.globalaccountingalliance.com](http://www.globalaccountingalliance.com)

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