

2020 Practice Management and Development Programme

The Practice Management and Development programme is taking place at various locations around the UK and Ireland. 2020 Members are entitled to free attendance at some of these seminars and non members are welcome to attend at an additional cost.

The programme consists of a wide range of seminars and conferences on a variety of topics including the Annual 2020 Conference, Spring Conference and IT Conference.

Non Members are welcome to attend any of these seminars.

Industry Experts will be invited to seminars to provide input on technical and regulatory issues and to share experiences and add value to the seminars for delegates.

We are also running a range of focus groups including Managing Partner Programme, Marketing, Information Technology and a Professional Development Programme for any future partners in your firm.

Courses for 2012

20 14th Annual 2020 Conference

20 IT Conference

20 Regional Roadshows - Making Excellence Standard Practice

20 Small Firms Conference

21 Spring Conference

21 Successful Wealth Management

21 Tax Conference

21 Tax Strategy Workshops

22 IT Focus Group

22 Managing Partner Focus Groups

23 Marketing Focus Group

23 Professional Development Programme

To view our full list of speakers please visit www.the2020group.com/speakers

2020 Seminars

Tel: +44 (0) 121 314 1234

Email: seminars@the2020group.com

www.the2020group.com/seminars



National Events

Date	Title	2020 Member	Non Member	Venue	Time
08 Mar 12	Spring Conference	£195/€215	£255/€285	Ricoh Arena Coventry	09.30 to 17.30
12 Mar 12	IT Focus Group	£295/€325	£295/€325	Arden Hotel NEC Birmingham	09.30 to 17.00
13 Mar 12	Managing Partner Focus Group – Cutting Edge	£395/€435	£395/€435	Marriott Forest of Arden	09.00 to 17.00 + dinner previous evening
21 Mar 12	IT Focus Group	£295/€325	£295/€325	Baker Tilly Bloomsbury London	09.30 to 17.00
02 May 12	Professional Development Programme	£1,400/€1,545	£1,400/€1,545	Hilton Euston London	10.00 to 17.00
03 May 12	Managing Partner Focus Group	£395/€435	£395/€435	Hilton Euston London	09.00 to 17.00 + dinner previous evening
10 May 12	Tax Conference	£195/€215	£245/€269	Hotel Russell London	09.30 to 17.30
21 May 12	Marketing Focus Group	£295/€325	£295/€325	Arden Hotel NEC Birmingham	09.30 to 17.00
22 May 12	Managing Partner Focus Group – Upstream Academy	£395/€435	£395/€435	Marriott Forest of Arden	09.00 to 17.00 + dinner previous evening
21 Jun 12	Small Firms Conference	£149/€165	£199/€219	Hotel Russell London	09.30 to 17.30
10 Sep 12	IT Focus Group	£295/€325	£295/€325	Arden Hotel NEC Birmingham	09.30 to 17.00
11 Sep 12	Managing Partner Focus Group – Cutting Edge	£395/€435	£395/€435	Marriott Forest of Arden	09.00 to 17.00 + dinner previous evening
11 Oct 12	Annual Conference	£210/€235	£260/€289	Hilton Birmingham Metropole	09.30 to 17.30
22 Nov 12	Professional Development Programme	£1,400/€1,545	£1,400/€1,545	Arden Hotel NEC Birmingham	10.00 to 17.00
29 Nov 12	IT Conference	£195/€215	£245/€269	Hotel Russell London	09.30 to 17.30
06 Dec 12	Managing Partner Focus Group	£395/€435	£395/€435	Hilton Euston London	09.00 to 17.00 + dinner previous evening
10 Dec 12	Marketing Focus Group	£295/€325	£295/€325	Arden Hotel NEC Birmingham	09.30 to 17.00
11 Dec 12	Managing Partner Focus Group – Upstream Academy	£395/€435	£395/€435	Marriott Forest of Arden	09.00 to 17.00 + dinner previous evening

Ireland

Date	Title	2020 Member	Non Member	Venue	Time
28 Jun 12	Regional Roadshow	free	£199/€219	Hilton Dublin Airport	09.30 to 17.30
16 Oct 12	Regional Roadshow	free	£199/€219	Park Avenue Hotel Belfast	09.30 to 17.30

London

Date	Title	2020 Member	Non Member	Venue	Time
23 Feb 12	Successful Wealth Management	free	£95/€105	Baker Tilly Bloomsbury London	14.00 to 17.30
TBA Spring	Tax Strategy Workshop	free	free	London	09.30 to 17.00
01 May 12	Regional Roadshow	free	£199/€219	Holiday Inn Bloomsbury London	09.30 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	London	09.30 to 17.00

Midlands

Date	Title	2020 Member	Non Member	Venue	Time
TBA Spring	Tax Strategy Workshop	free	free	Birmingham	09.30 to 17.00
17 May 12	Regional Roadshow	free	£199/€219	Holiday Inn Birmingham Airport	09.30 to 17.30
27 Sep 12	Successful Wealth Management	free	£95/€105	Arden Hotel NEC Birmingham	14.00 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	Birmingham	09.30 to 17.00

Please note: All prices are net of VAT

North West

Date	Title	2020 Member	Non Member	Venue	Time
29 Mar 12	Successful Wealth Management	free	£95/€105	Hilton Manchester Airport	14.00 to 17.30
TBA Spring	Tax Strategy Workshop	free	free	Manchester	09.30 to 17.00
15 Nov 12	Regional Roadshow	free	£199/€219	Hilton Manchester Airport	09.30 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	Manchester	09.30 to 17.00

Scotland

Date	Title	2020 Member	Non Member	Venue	Time
TBA Spring	Tax Strategy Workshop	free	free	Glasgow	09.30 to 17.00
26 Jun 12	Regional Roadshow	free	£199/€219	Hilton Edinburgh Grosvenor	09.30 to 17.30

South East

Date	Title	2020 Member	Non Member	Venue	Time
13 Nov 12	Regional Roadshow	free	£199/€219	Copthorne Hotel Effingham Gatwick	09.30 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	Gatwick	09.30 to 17.00

South West

Date	Title	2020 Member	Non Member	Venue	Time
TBA Spring	Tax Strategy Workshop	free	free	Bristol	09.30 to 17.00
18 Oct 12	Regional Roadshow	free	£199/€219	Bristol Golf Club	09.30 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	Bristol	09.30 to 17.00

Yorkshire and The Humber

Date	Title	2020 Member	Non Member	Venue	Time
TBA Spring	Tax Strategy Workshop	free	free	Leeds	09.30 to 17.00
26 Apr 12	Regional Roadshow	free	£199/€219	Holiday Inn Leeds Garforth	09.30 to 17.30
06 Nov 12	Successful Wealth Management	free	£95/€105	Holiday Inn Leeds Garforth	14.00 to 17.30
TBA Autumn	Tax Strategy Workshop	free	free	Leeds	09.30 to 17.00

Please note: All prices are net of VAT

2020 Tax Protection

Is a partnership between 2020 and PFP to provide tax fee protection to UK professionals.

PFP have been working with thousands of accountancy practices for over 25 years providing clients with the benefit of their vast experience in fee protection insurance.



2020
Tax Protection

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www.2020taxprotection.com

SEE PAGE 10 FOR MORE INFORMATION

14th Annual 2020 Conference

Speakers: Ian Fletcher, Chris Frederiksen and Gordon Gilchrist

The premier conference for successful practising accountants and tax professionals.

Key Topics

- Key predictions for the future - the consultants predict trends, issues and challenges to the accounting profession, and offer solutions.
- Special guest speakers to be announced.
- Chris Frederiksen, Ian Fletcher and Gordon Gilchrist will give you an insight into the latest practice management and marketing techniques currently being adopted by the most profitable firms in the UK.

Relax and discuss the day with fellow professionals over a three course dinner with a selection of fine wines and be entertained by our guest speaker.

On Friday 12th October 2012 there is an optional half day session. This session is free of charge for Thursday attendees.

The conference commences at 09.30 on 11th October and finishes at 12.30 on 12th October 2012.

Date	Location
11 and 12 October 2012	Hilton Birmingham Metropole

Basic 8 hour conference rate, including lunch:
2020 Members £210 / €235 plus VAT
Non Members £260 / €289 plus VAT

For those delegates wishing to stay for dinner there is an additional charge of £60 / €65 plus VAT

IT Conference

Speakers: Ian Fletcher, Gordon Gilchrist, Kevin Salter and invited guests

This conference will provide a unique opportunity to see the latest and greatest developments in our industry. In this fast paced conference we will examine the most innovative products, software and ideas that could benefit your productivity, marketing and the development of your practice.

Key Topics

- How much should IT cost?
- What the most profitable firms do differently
- Apps, gadgets, gizmos and other useful tools
- Remote access and the 'cloud'
- Less paper solutions and developments
- Online accounting update
- Mobile technology
- Work flow developments
- Security and portals
- Some seriously weird ideas for the future

Date	Location
29 November 2012	Hotel Russell London

The conference commences at 09.30 and finishes at 17.30.

2020 Members £195 / €215 plus VAT
Non Members £245 / €269 plus VAT

Regional Roadshows

Making Excellence Standard Practice

Speakers: Ian Fletcher, Chris Frederiksen and Gordon Gilchrist and guests

We are on the move! In response to member requests we are bringing our famous 2020 Roadshow to a venue near you!

At 2020 we believe in order to be successful you've got to be different and in this fast paced full day we will share with you:

- What our most successful firms do differently
- The latest and greatest practice management and development ideas
- New ways of generating income for your practice
- How to set a strategy for growth and profit
- How to add value to your compliance services
- How to truly unlock your potential!
- Management issues – lock-up, chargeable hours, recoveries and value pricing
- Added value services – tax, wealth management and 'insourcing'
- Social media – get with the programme!
- IT – Cloud, CRM and workflow
- HR – keeping your team motivated

Date	Location
26 April 2012	Leeds
01 May 2012	London
17 May 2012	Birmingham
26 June 2012	Edinburgh
28 June 2012	Dublin
16 October 2012	Belfast
18 October 2012	Bristol
13 November 2012	Gatwick
15 November 2012	Manchester

The Roadshows commence at 09.30 and finish at 17.30.

2020 Premier Members free of charge
2020 Associate Members £149 / €159 plus VAT
Non Members £199 / €219 plus VAT

Small Firms Conference

Speakers: Chris Frederiksen and Gordon Gilchrist

This one day conference is designed to keep you focused on what is really important in 2012.

We will examine what the most successful small firms do differently and show you the latest techniques to reduce the cost of firm operations, improve efficiency and new ways to increase revenue!

Key Topics

- Setting targets
- Maintaining growth
- Improving profits
- Technology update
- Cost effective marketing
- Getting the best from your staff
- Problem-solving breakout sessions
- The latest practice development ideas
- Putting a plan together

We have also invited several highly successful small firm practitioners to come and share their ideas, successes and methods with delegates.

Date	Location
21 June 2012	Hotel Russell London

The conference commences at 09.30 and finishes at 17.30.

2020 Members £149 / €165 plus VAT
Non Members £199 / €219 plus VAT

Spring Conference

Speakers: Ian Fletcher, Chris Frederiksen and Gordon Gilchrist

This one day conference provides firms with the latest marketing and practice management solutions. Chris Frederiksen, Ian Fletcher and Gordon Gilchrist will give you an insight into the latest practice management and marketing techniques currently being adopted by the most profitable firms in the UK.

Key Topics

- Innovative ideas
- The latest practice Management techniques
- New revenue streams

This conference is your chance to bring all your partners and key fee earners to gain insights and meet other forward thinking accounting firms – a rare opportunity!

Date	Location
08 March 2012	Ricoh Arena Coventry

The conference commences at 09.30 and finishes at 17.30.

2020 Members £195 / €215 plus VAT
Non Members £255 / €285 plus VAT

Successful Wealth Management

Speakers: Ian Fletcher and Jonathan Morley

Are you getting 40% of your GRF from these product lines?

Wealth Management has been available to accountants as a service offering for a generation. Yet the majority of firms have either not taken up this opportunity or they have been disappointed with the results. Done properly, Wealth Management addresses all areas of a client's financial well-being, not just investments. It covers the full spectrum of wealth creation, wealth protection and wealth disposal.

The key, as in most endeavours, is people. You need to select the right alliance with people you trust and who trust you. And you need to get the structure right. Some accountants deliver the advice themselves, some hire IFAs on staff and others enter into introducer agreements or joint ventures with IFA firms, which can be local or national in scope. The key objective is to get the right model for your firm. You also need to market these services effectively since they are a discretionary purchase.

Key Topics

- How to organise your Wealth Management Practice
- Exit, profit improvement and protection issues you should be talking to clients about
- The four provider models and choosing the one that's right for your firm
- Ten steps to building an awesome marketing machine
- Choosing the right alliance partners
- How to get all your partners and members of staff involved
- The important link between tax planning and wealth management
- Marketing effectively to existing clients
- The keys to success in Wealth Management

Date	Location
23 February 2012	London
29 March 2012	Manchester
27 September 2012	Birmingham
06 November 2012	Leeds

The seminars commence at 14.00 and finish at 17.30.

2020 Members free of charge
Non Members £95 / €105

Tax Conference

Speakers: Ian Fletcher, Gordon Gilchrist and invited guests

With so many changes announced to the tax system, it is essential that all fee earners are aware of these changes, current problem areas and recent and impending tax developments.

This one day conference is specifically designed to ensure you and your colleagues are up to date and fully aware of all your clients' tax planning options.

This conference will update delegates with any recent technical and Budget changes and ensure they understand the use of trusts, tax strategies and how to minimise their clients' risk of investigation.

Key Topics

- Technical tax update
- Tax planning tips, practical tools and spreadsheets
- HMRC investigation trends and tactics
- The latest tax strategies and their effectiveness

Date	Location
10 May 2012	Hotel Russell London

The conference commences at 09.30 and finishes at 17.30.

2020 Members £195 / €215 plus VAT
Non Members £245 / €269 plus VAT

Tax Strategy Workshops

Speakers: Douglas Aitken, David Gill and invited guests

Following the success and interest shown during previous seminars on tax planning strategies, we are delighted to announce our 2012 series. These half day seminars will introduce strategies from key tax planning providers and will give you the confidence to introduce your clients to the opportunities available.

These events are hosted with Peak Performance Tax, whose role it is to support you by providing focused education and support not only helping you understand how (and why) tax strategies work but also in how to identify and capitalise on the opportunities within your client and prospect base.

Key Topics

- Review recent changes in legislation, tax cases and HMRC policies and how these have affected the marketplace
- Discuss the future market for tax planning
- Update yourself on what products are now available, including some new offerings
- Let us share thoughts on worthwhile activity which will generate results for you and your clients
- Learn about Contractor and SME company solutions

We know that giving up your time is a significant investment and that's why it is being offered to you free of charge – but you should only come along if you are serious about offering this solution to your clients.

Date	Location
TBA Spring	Leeds
TBA Spring	London
TBA Spring	Glasgow
TBA Spring	Bristol
TBA Spring	Birmingham
TBA Spring	Manchester
TBA Autumn	London
TBA Autumn	Birmingham
TBA Autumn	Bristol
TBA Autumn	Gatwick
TBA Autumn	Manchester
TBA Autumn	Leeds

The seminars commence at 09.30 and finish at 17.00.

Free of charge to all participants

Focus Groups

A focus group is a gathering of like-minded individuals representing firms across the UK and Ireland (and occasionally further afield) who meet for an intense full day session, although the Managing Partner focus groups meet the evening before for a working dinner. Focus groups are one of the most successful methodologies of exposing your colleagues to the realities of running a practice and, at the same time, providing real and practical solutions. Participants are all willing to share ideas and develop relationships and, as a result, consistently benefit from new ideas, problem solving discussions and often discover new resources.

Three important features of each meeting are:

- 1 Each firm updates the group with their most successful ideas over the past year or so, which is a great way to get new ideas.
- 2 Each firm has the opportunity to share their most important concerns and this often forms the basis of the agenda for the remaining time of the meeting.
- 3 All the discussion points, information and recommendations from the meeting are summarised and distributed to participants (on a strictly confidential basis).

If you are interested in attending a focus group, please contact the Seminars Team on +44 (0) 121 314 1234 or email info@the2020group.com

IT Focus Group

Facilitator: Gordon Gilchrist and/or Chris Frederiksen

This forum is very valuable to partners in charge of IT and also for any IT professionals you may have who are responsible for IT within your firm.

This focus group provides a unique opportunity for the development of new ideas, concepts, and forging relationships with like-minded practices. You will be able to share a wide range of IT issues with the specific objectives of helping your firm improve its IT offering to clients as well as looking at your own firm's internal IT efficiency.

The agenda for the day is developed from those attending but here are some items that we covered in previous meetings, most of which requires updating:

- Cloud
 - a Online accounting software
 - b Databases
 - c Security
 - d Client Portals
- Paperless/Document Management
- Digital Dictation and Voice Recognition
- Mobile Communications
- Multi Office Communications
- In-house IT Resource versus External Support
- Disaster Recovery and Data Protection
- Workflow and Job Management
- Fee Earning Opportunities
- Exception reporting/alerts
 - a Chargeable hours
 - b WIP recoveries/days
 - c Turnaround time etc.

As a result of the agenda listed above, you will receive the following benefits:

- Lots of new, innovative and practical ideas from colleagues within the group.
- Help to formulate your own firm's strategic IT plan.
- There may be some ideas which you were planning to do but may be warned off by others' experiences.
- Resolution to issues that you may welcome some assistance with.

IT Partners are encouraged to bring their IT Professionals with them and IT professionals are also encouraged to bring their IT Partner with them. We have found this helps facilitate and implement the ideas when we return back to our offices.

Numbers will be restricted to 15 attendees and we will accept responses on a first come first served basis.

Date	Location
12 March 2012	Arden Hotel NEC Birmingham
21 March 2012	Baker Tilly Bloomsbury London
10 September 2012	Arden Hotel NEC Birmingham

Cost: £295/€325 plus VAT

Timings: These focus groups commence at 09.30 and finish at 17.00.

Each meeting will be facilitated by Gordon Gilchrist and/or Chris Frederiksen. Their job is to make you aware of the latest issues and trends in the profession and to share ideas and approaches from other practices. We encourage firms to send 2 representatives to each meeting as implementation of ideas is often more successful this way.

Please note: These are **not** widely marketed as they are well attended by previous attendees. However, if you would like to be invited PLEASE let us know.

Managing Partner Focus Groups

Facilitator: Gordon Gilchrist and/or Chris Frederiksen

The Managing Partner focus groups are for partners in go-ahead accountancy firms who convene the night before for a working dinner with Gordon Gilchrist and/or Chris Frederiksen to network and enjoy a three course dinner with a selection of wines.

Typical agenda items might include:

- Marketing
- Financial services
- Fee pressure
- Outsourcing - India
- Figures out / insourcing
- Weaker sisters
- Cash collection
- Cloud / IT / Paperless
- Staff - motivated and capable
- Succession planning / equity niches
- Mergers / acquisitions
- Tax fee protection

As a result of the agenda listed above, you will receive the following benefits:

- Lots of new, innovative and practical ideas from colleagues within the group.
- Help to formulate your own firm's strategic plan.
- There may be some ideas which you were planning to do but may be warned off by others' experiences.
- Resolution to issues that you may welcome some assistance with.

Below are the dates of the programme in each area.

	Date	Location
Managing Partner Focus Group	03 May 2012	Hilton Euston London
Managing Partner Focus Group – Cutting Edge	06 Dec 2012	Hilton Euston London
Managing Partner Focus Group – Cutting Edge	13 Mar 2012	Marriott Forest of Arden Hotel
Managing Partner Focus Group – Upstream Academy	11 Sep 2012	Marriott Forest of Arden Hotel
Managing Partner Focus Group – Upstream Academy	22 May 2012	Marriott Forest of Arden Hotel
Managing Partner Focus Group – Upstream Academy	11 Dec 2012	Marriott Forest of Arden Hotel

Cost: £395/€435 plus VAT including working dinner and wine

Timings: These focus groups commence with a working dinner the evening before and continue the following morning at 09.00, finishing at 17.00.

Marketing Focus Group

Facilitator: Gordon Gilchrist

We are seeing a resurgence in marketing efforts across the profession and the pressure continues into 2012, not least, because we are all looking to keep our best clients and add some new fees in these challenging times.

These meetings have been running for over 10 years and are regularly re-attended by the majority of participants. This demonstrates that they are a very successful forum for marketers and marketing partners to meet like minded professionals and share a wide range of marketing and practice development ideas, with the specific objective to help you market your own firm.

Agenda items from previous meetings include:

- ✔ Websites
- ✔ Client Portals
- ✔ Staff and Partner Involvement in Marketing
- ✔ Social Media
- ✔ Seminars
- ✔ Bank Relationships
- ✔ Training Partners on Cross Selling and Client Care
- ✔ Tax Fee Protection
- ✔ Databases
- ✔ CRM Software
- ✔ Niches
- ✔ Telemarketing
- ✔ Additional service lines
- ✔ Outsourcing/Insourcing
- ✔ Online Solutions

As a result of the agenda listed above, you will receive the following benefits:

- ✔ Lots of new, innovative and practical ideas from colleagues within the group.
- ✔ Help to formulate your own firm's strategic thinking and marketing plans.
- ✔ There may be some ideas which you were planning to do but may be warned off by others' experiences.
- ✔ Resolution to issues that you may welcome some assistance with.

Numbers will be restricted to 15 attendees and we will accept responses on a first come first served basis.

Partners are encouraged to bring their marketing personnel with them and, marketing personnel are also encouraged to bring their Marketing Partner with them. We have found this helps facilitate marketing activity when we return back to our offices.

Date	Location
21 May 2012	Arden Hotel NEC Birmingham
10 December 2012	Arden Hotel NEC Birmingham

Cost: £295/€325 plus VAT

Timings: These focus groups commence at 09.30 and finish at 17.00.

Professional Development Programme

Facilitator: Gordon Gilchrist

The Professional Development Programme (PDP) is expressly designed for fee earners with potential (who may be partners designate) to excel, ensuring firms benefit from their input, as well as addressing any succession issues your firm may have. It includes comprehensive leadership, practice development, client satisfaction and added value programmes. Participants will be equipped with all the necessary skills to consistently perform for the firm.

Key skills covered include:

- ✔ Building a QUALITY client base for the future
- ✔ Leadership
- ✔ Generating new assignments and being proactive
- ✔ Understanding what business partnerships are and how (and why) things change
- ✔ Building value in the business
- ✔ Selling skills
- ✔ Negotiation

Many firms are thinking about retaining their best team members and are also looking towards these professionals as their possible successors. One major concern is whether they are equipped to take on all the tasks required today and an understanding of what the future holds and, whether they have the skills to take the firm on successfully. As a result, the PDP was developed to provide the following key attributes:

- ✔ Consistently increase revenue and profits
- ✔ Build self-confidence
- ✔ Demonstrate commitment to younger professionals
- ✔ Address the day-to-day activities in the working environment
- ✔ Ensure participants are working to share their experience so that we achieve a deeper understanding

The dates below are the first day of the programme in each area.

Date	Location
02 May 2012	Hilton Euston London
22 November 2012	Arden Hotel NEC Birmingham

This four day programme will be held over an 18 month period.

Cost: £1,400 / €1,545 plus VAT

Timings: These programmes commence at 10.00 and finish at 17.00.

Speakers

Alan Bonham

Ian Fletcher

Chris Frederiksen

Gordon Gilchrist

Gerry Hart

Martyn Ingles

Guy Loveday

Ros Martin

Kevin Read

John Selwood

Bob Trunchion

Mark Ward

Neil Warren

To view our full list of speakers please visit www.the2020group.com/speakers

2020 Speakers

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Seminar Registration Form 2012

Please photocopy this form as needed

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Company / Organisation

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Postcode

Contact Name

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I would like to pay by the following method:

By Bank Transfer to: Barclays Bank plc - Account No: 10373192 - Sort Code: 20-07-71 (Please quote company name)

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I wish to book the following

Date	Course Title	Delegate Name	Location	Cost

Please return this registration form with any payment due to:

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or

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Dublin 1 Ireland

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Total £/€

Please add VAT at the current rate

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