The 2020 Training Directory 2011

Providing CPD Training, Practice Management and Development seminars and Focus Groups at a variety of locations throughout the UK and Ireland.

CPD Programme | Practice Management and Development Programme | Webinar Programme

2020 Innovation

Welcome, take a seat!

Our 2011 Training Directory provides CPD Training, Practice Management and Development seminars and Focus Groups at a variety of locations throughout the UK and Ireland. Teamed with our Webinar Programme, all are specifically designed to meet the needs of accountants, tax practitioners and consultants and qualify for CPD.

We are flexible with your booking requirements so if you are unable to attend a course in one location, we can switch you to another, subject to availability.

CPD Programme

In 2011 we will be running over 100 CPD seminars at 11 locations throughout the UK. For further details and a full list of events see page 1.

Practice Management and Development Programme

A wide range of seminars and conferences on a variety of topics taking place at locations around the UK and Ireland. For full details of our Practice Management and Development Programme see page 12.

2020 Webinar Programme

Our comprehensive webinar programme covers a wide range of topics including Monthly Tax Updates, Quarterly Audit and Accounts Updates and FSA Updates. For further information see page 20, or visit **www.the2020group.com/webinars** for a full list of events.

CPD Programme 2011

We are pleased to again be partnering with the Smart Training Group for the Birmingham and Cardiff venues and SWATUK in Bristol and Gloucester. This gives you maximum choice and flexibility in achieving your CPD training requirements.

Throughout the UK

Birmingham In association with Smart Training
Bradford
Bristol In association with
Cardiff In association with Smart Training
Gatwick
Gloucester In association with
London
Newcastle
Nottingham
South Mimms
Stansted

Courses for 2011

CPD Programme 2011 - Venues

Birmingham

In association with Smart Training

Venue: Arden Hotel, Birmingham NEC (M42, J6)
Coventry Road, Bickenhill, Solihull, West Midlands B92 0EH
Tel: +44 (0) 1675 443 221

DATE	COURSE	TIME	£	SPEAKER
15 Feb 11	Tax Planning for Family Companies	pm	£56	Martyn Ingles
29 Mar 11	Small Company Reporting Issues	pm	£56	John Selwood
13 Apr 11	Budget and Tax Update	pm	£56	Gerry Hart
10 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	Alan Bonham
16 Jun 11	Corporation Tax Refresher and Update	pm	£56	Ros Martin
05 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
07 Sep 11	Audit and Accounts Update	pm	£56	Guy Loveday
06 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Tim Palmer
30 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
06 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Andrew Gotch

pm courses run from 13.45 - 16.45

Bradford

Venue: Bradford City Football Club (M606, J1)
Coral Windows Stadium, Valley Parade, Bradford BD8 7DY
Tel: +44 (0) 1274 706 848

DATE	COURSE	TIME	£	SPEAKER
21 Feb 11	Tax Planning for Family Companies	pm	£56	Mark Ward
09 Mar 11	Small Company Reporting Issues	pm	£56	Roger Bryant
06 Apr 11	Budget and Tax Update	pm	£56	Tim Palmer
03 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	Adrian Gibbons
08 Jun 11	Corporation Tax Refresher and Update	pm	£56	Martyn Ingles
12 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
22 Sep 11	Audit and Accounts Update	pm	£56	Guy Loveday
18 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Gerry Hart
09 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
01 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Ros Martin

pm courses run from 13.45 - 16.45

Bristol

In association with

Venue: Future Inn Bristol (A4044/A420)
Bond Street South, Bristol BS1 3EN
Tel: +44 (0) 845 094 5588

DATE	COURSE	TIME	£	SPEAKER
23 Feb 11	Charities – Accounts and Audit	pm	£56	Jenny Reed
14 Mar 11	CGT Update	pm	£84	Robert Jamieson
15 Mar 11	How to Act as Executor	am	£112	Robert Trunchion
16 Mar 11	General Tax Update	am	£56	Robert Neeve
16 Mar 11	Practical Tax Case Studies	pm	£56	Robert Neeve
12 May 11	Legal and Regulatory Update	am	£140	Louise Dunford
05 Jul 11	Accounting and Auditing Update	pm		
	• Financial Reporting and Accounting update	1.5hrs	£28	Adrian Gibbons
	• Auditing Update	1.5hrs	£28	
21 Jul 11	Tax Implications of Transactions between a Company and its Directors	am	£84	Kevin Read
15 Sep 11	Accounting and Reporting for Small Companies	am	£56	Jane Mather
29 Sep 11	Finance Act and Topical Issues Update	am	£56	Mark Ward
04 Oct 11	Adjustments to Profit and Minimising Business Tax	pm	£56	Malcolm Greenbaum
17 Nov 11	Making Money under Clarified ISAs	pm	£56	Adrian Gibbons
08 Dec 11	Acting on Behalf of Dentists	pm	£112	Robert Trunchion

am courses run from 09.30 - 13.00
pm courses run from 14.00 - 17.30

Cardiff

In association with Smart Training

Venue: Park Inn Cardiff (M4, J29)
Circle Way East, Llanedeyrn, South Glamorgan CF23 9XF
Tel: +44 (0) 29 2058 9988

DATE	COURSE	TIME	£	SPEAKER
24 Feb 11	Tax Planning for 5 April 2011/New Client – Start Up, Growth and Exit	pm	£56	Martyn Ingles
18 Mar 11	Taxation of Land and Property	pm	£56	Giles Mooney
12 Apr 11	Budget and Tax Update	am	£56	Dean Wootten
17 May 11	Small Company Reporting issues	pm	£56	Peter Herbert
22 Jun 11	Tax Issues of Buying and Selling Businesses	pm	£56	Robert Trunchion
04 Jul 11	VAT Update and Current Problem Areas	am	£56	Neil Warren
26 Sep 11	Corporation Tax Refresher and Update	pm	£56	Martyn Ingles
21 Oct 11	CGT and IHT: Hot Issues for General Practices	pm	£56	Robert Jamieson
10 Nov 11	Accountancy and Practice Regulation Update	pm	£56	John Selwood
06 Dec 11	Finance Act 2011 and Tax Update	pm	£56	Peter Bunting

am courses run from 09.30 - 12.30
pm courses run from 13.45 - 16.45

Please note: All prices are net of VAT

CPD Programme 2011 - Venues continued

Gatwick

Venue: Hawth Theatre (M23, J10/J11)
Hawth Avenue, Crawley RH10 6YZ
Tel: +44 (0) 1293 552 941

DATE	COURSE	TIME	£	SPEAKER
15 Feb 11	Tax Planning for Family Companies	pm	£56	Peter Bunting
17 Mar 11	Small Company Reporting Issues	pm	£56	Alan Bonham
05 Apr 11	Budget and Tax Update	pm	£56	Ros Martin
06 May 11	Efficient Auditing under the Clarified ISAs	am	£56	Adrian Gibbons
21 Jun 11	Corporation Tax Refresher and Update	pm	£56	Martyn Ingles
13 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
15 Sep 11	Audit and Accounts Update	pm	£56	John Selwood
12 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Tim Palmer
02 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
29 Nov 11	Current Tax Problems and Investigations Update	pm	£56	Gerry Hart

am courses run from 09.30 - 12.30
pm courses run from 13.45 - 16.45

London

Venue: Russell Square House (A501/A4200)
10 -12 Russell Square, London WC1B 5EH
Tel: +44 (0) 203 201 8000

DATE	COURSE	TIME	£	SPEAKER
23 Feb 11	Tax Planning for Family Companies	pm	£56	Mark Ward
08 Mar 11	Small Company Reporting Issues	pm	£56	John Selwood
07 Apr 11	Budget and Tax Update	pm	£56	Martyn Ingles
12 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	Alan Bonham
08 Jun 11	Corporation Tax Refresher and Update	pm	£56	Giles Mooney
29 Jun 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
08 Sep 11	Audit and Accounts Update	pm	£56	Guy Loveday
19 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Gerry Hart
03 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
08 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Ros Martin

pm courses run from 13.45 – 16.45

Gloucester

In association with

Venue: Hatherley Manor Hotel (M5 J11 / A38)
Down Hatherley Lane, Gloucester GL2 9AQ
Tel: +44 (0) 1452 730 217

DATE	COURSE	TIME	£	SPEAKER
10 Feb 11	Implementing PCAS for Clarified ISAs	pm	£56	David Norris
17 Feb 11	Implementing Kestrian for Clarified ISAs	am	£56	Jane Mather
09 Mar 11	Charities – Accounts and Audit	pm	£56	Jenny Reed
17 Mar 11	General Tax Update	am	£56	Robert Neeve
06 Apr 11	Accounting and Auditing Update	am		
	• Financial Reporting and Accounting update	1.5hrs	£28	Adrian Gibbons
	• Auditing Update	1.5hrs	£28	
14 Apr 11	CGT Update	am	£84	Robert Jamieson
09 May 11	Dealing with Employment Law Issues	pm	£140	Anne Knell
07 Jun 11	VAT Hot Topics	pm	£56	Mike Thexton
13 Jul 11	Management and Financial Advice for SMEs	pm	£112	Nigel Smith
20 Jul 11	Tax Implications of Transactions between a Company and its Directors	pm	£84	Kevin Read
30 Sep 11	Finance Act and Topical Issues Update	am	£56	Mark Ward
02 Nov 11	Adjustments to Profit and Minimising Business Tax	am	£56	Malcolm Greenbaum
09 Nov 11	Valuations of Unquoted Companies and Businesses	am	£112	Jenny Nelder

am courses run from 09.30 - 13.00
pm courses run from 14.00 - 17.30

Newcastle

Venue: Newcastle Falcons Rugby Club (A1/A696)
Kingston Park, Brunton Road, Kenton Bank Foot,
Newcastle-upon-Tyne NE13 8AF Tel: +44 (0) 191 214 5588

DATE	COURSE	TIME	£	SPEAKER
16 Feb 11	Tax Planning for Family Companies	pm	£56	Martyn Ingles
08 Mar 11	Small Company Reporting Issues	pm	£56	Alan Bonham
12 Apr 11	Budget and Tax Update	pm	£56	Peter Bunting
10 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	John Selwood
07 Jun 11	Corporation Tax Refresher and Update	pm	£56	Ros Martin
30 Jun 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
12 Sep 11	Audit and Accounts Update	pm	£56	Guy Loveday
05 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Tim Palmer
10 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
01 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Gerry Hart

pm courses run from 13.45 – 16.45

Please note: All prices are net of VAT

CPD Programme 2011 - Venues continued

Nottingham

Venue: Novotel Nottingham (M1, J25)
Bostock Lane, Long Eaton, Nottingham NG10 4EP
Tel: +44 (0) 115 946 5111

DATE	COURSE	TIME	£	SPEAKER
24 Feb 11	Tax Planning for Family Companies	pm	£56	Mark Ward
15 Mar 11	Small Company Reporting Issues	pm	£56	Roger Bryant
07 Apr 11	Budget and Tax Update	pm	£56	Tim Palmer
12 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	John Selwood
14 Jun 11	Corporation Tax Refresher and Update	pm	£56	Ros Martin
06 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
14 Sep 11	Audit and Accounts Update	pm	£56	Alan Bonham
18 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Martyn Ingles
29 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
07 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Andrew Gotch

pm courses run from 13.45 – 16.45

South Mimms

Venue: Premier Inn (M25, J23/A1, J1) Swanland Road,
South Mimms, Potters Bar, Hertfordshire EN6 3NR
Tel: +44 (0) 871 527 8990

DATE	COURSE	TIME	£	SPEAKER
22 Feb 11	Tax Planning for Family Companies	pm	£56	Gerry Hart
23 Mar 11	Small Company Reporting Issues	pm	£56	Alan Bonham
12 Apr 11	Budget and Tax Update	pm	£56	Ros Martin
17 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	Adrian Gibbons
01 Jun 11	Corporation Tax Refresher and Update	pm	£56	Mark Ward
07 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
13 Sep 11	Audit and Accounts Update	pm	£56	Guy Loveday
19 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Martyn Ingles
15 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
01 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Tim Palmer

pm courses run from 13.45 – 16.45

Stansted

Venue: Weston Business Centre (M11, J8)
Parsonage Road, Takeley CM22 6PU
Tel: +44 (0) 1279 874 100

DATE	COURSE	TIME	£	SPEAKER
24 Feb 11	Tax Planning for Family Companies	pm	£56	Gerry Hart
29 Mar 11	Small Company Reporting Issues	pm	£56	Roger Bryant
13 Apr 11	Budget and Tax Update	pm	£56	Tim Palmer
11 May 11	Efficient Auditing under the Clarified ISAs	pm	£56	Adrian Gibbons
15 Jun 11	Corporation Tax Refresher and Update	pm	£56	Martyn Ingles
14 Jul 11	VAT Update and Current Problem Areas	pm	£56	Neil Warren
20 Sep 11	Audit and Accounts Update	pm	£56	Alan Bonham
12 Oct 11	Finance Act 2011 and Tax Update	pm	£56	Ros Martin
16 Nov 11	Practical Use of Trusts	pm	£56	Robert Neeve
05 Dec 11	Current Tax Problems and Investigations Update	pm	£56	Andrew Gotch

pm courses run from 13.45 – 16.45

Please note: All prices are net of VAT

CPD Programme 2011 - Courses

Accountancy and Practice Regulation Update

Speaker: John Selwood

Objectives

This course aims to update delegates on the latest accounting and practice regulation developments that affect SMEs and general accountancy practices.

Course Programme

- FRSSE update
- ASB updates
- Exposure drafts
- Forthcoming accountancy regulation developments
- Changes to ethical rules
- Practice and quality assurance developments
- Financial disclosures update
- Audit exempt companies
- Update on the companies legislation
- Update on money laundering legislation

Who Should Attend?

This course is aimed at qualified accountants, managers and partners who need to be fully updated on changes in regulation.

Accounting and Auditing Update

Speaker: Adrian Gibbons

In association with

This is a combined course made up of:

- Financial Reporting and Accounting Update; and
- Auditing Update

Please see their respective outlines for full details.
Each course is 1½ hours long, with a 30 minute break in between.
Combined, these two sessions make the Accounting and Auditing Update course.

Accounting and Reporting for Small Companies

Speaker: Jane Mather

In association with

Objectives

The aim of the course is to familiarise delegates with the content of the current FRSSE / relevant parts of the Companies Act, and to consider issues that arise in the preparation of small company accounts.

Course Programme

- Events after the balance sheet date
- Revenue recognition
- Classification of capital instruments
- Share based payments
- Common problem areas as noted from SWAT reviews
- Emerging issues
- Related party transactions
- Transactions with directors

Who Should Attend?

This course is aimed at all principals, managers and staff involved in the preparation of small company accounts.

Acting on Behalf of Dentists

Speaker: Robert Trunchion

In association with

Objectives

The face of dentistry has changed dramatically over the last five years and most dentists now have potentially highly profitable businesses which have become less dependent on the NHS despite the introduction of a new contract / Personal Dental Services. However, the credit crunch has had large effects on some areas of private practice so dentists must, therefore, adapt to this aggressive environment or see their practice shrink. The matter is further complicated by the Government planning to scrap the 2009 dentists contract and the related infrastructure and replace it with a radically different structure.

Course Programme

- The NHS and dentists - an overview
- The Coalition Government and dentistry
- Fees/income sources for dentists
- Private dental practices
- Structure – associates, support structures, technicians, hygienists
- Accounts, tax (inc. Capital Allowances), VAT, PAYE problems
- Tax planning – superannuation/pension provision
- Structure – sole practitioners, associates, companies
- Implications of buying and selling a dental practice

Who Should Attend?

This course is aimed at accountants acting for dentist clients or those wishing to enter this important niche market.

Adjustments to Profit and Minimising Business Tax

Speaker: Malcolm Greenbaum

In association with

Objectives

This course aims to ensure delegates are fully up-to-date with the latest tax planning points and recent case laws so that they can help clients save tax and avoid typical enquiries into tax returns.
This is an area which most people involved in tax seem confident in but it is easy to miss important simple planning points and key case decisions which could help themselves and their clients to save tax or avoid an unnecessary enquiry into tax returns. With HMRC paying increasing attention to the computation of taxable trading profits it pays to be as sharp as possible in this area.

Course Programme

- Accounting issues and tax – common problem areas
- Review of recent tax cases and how the impact of accounting standards affected the decision
- Capital allowances – recent statutory changes and case law
- Valuing goodwill and amortisation/impairment
- Administrative problems and pitfalls

Who Should Attend?

This course is designed for all partners and managers involved in advising clients on minimising their business tax.

CPD Programme 2011 - Courses continued

Audit and Accounts Update

Speakers: Alan Bonham, Guy Loveday and John Selwood

Objectives

This course will include a practical and extensive review of developments in accounting standards. The content will give an indication of the changes likely to occur in the near future, a review of Company Law developments and a review of changes applicable to UK auditors.

Course Programme

- Update on the current status of ASB Accounting Standards and Exposure Drafts
- Update on the current status of UITF Abstracts
- FRSSE issues
- Legal developments affecting audit and accounts including any Companies Act changes and new Statutory Instruments
- Reports on issues arising on the use of the clarified ISAs
- Update on the current status of APB Standards, Bulletins, Practice Notes and Consultation Drafts

Who Should Attend?

This course is aimed at all fee earners involved in the audit of, and accounting for, SMEs.

Auditing Update

Speaker: Adrian Gibbons

In association with

Objectives

The objective of this course is to update delegates on the latest standards from the APB, updates from professional bodies on audit and current issues, and will include practical guidance based on file reviews.

Course Programme

The course programme for this event is determined by current issues, including:

- ISA update
- Practice Notes and bulletins
- Company Law changes and reviews
- Other topical issues relevant to audit

NB. This course is 1½ hours long. It can be attended as a standalone session or combined with the Financial Reporting and Accounting Update course, running in the same venue on the same day, to provide an Accounting and Auditing Update course.

Who Should Attend?

This course is essential for the responsible individual and any qualified member of staff who is involved in audit.

Budget and Tax Update

Speakers: Peter Bunting, Gerry Hart, Martyn Ingles, Ros Martin, Tim Palmer and Dean Wootten

Objectives

This course will review all current tax and NIC developments relevant to smaller practices and their clients, identifying tax planning advice and highlighting the practical impact of changes made and proposed.

Course Programme

- Budget and Finance Bill
- Corporation Tax
- Income Tax
- PAYE, NIC and Benefit-in-Kind changes
- CGT and Inheritance Tax Update
- Overview of key VAT changes
- Tax administration – penalties and compliance effort
- Stamp duty refresher
- General overview
- Investigations Update
- Latest HMRC Policies

Who Should Attend?

This course is aimed at all fee earners who want to understand the impact of taxation on their clients.

CGT and IHT: Hot Issues for General Practices

Speaker: Robert Jamieson

Objectives

This course is designed for accountants involved with CGT and IHT and provides a detailed review of the changes that affect these two taxes.

Course Programme

- CGT changes
- IHT changes
- Changes to Entrepreneur's relief
- Changes made in the Finance Acts
- Review of recent cases
- CGT for companies
- Treatment of tax losses
- IHT planning opportunities

Who Should Attend?

This course is aimed at tax specialists and fee earners involved in advising clients on CGT and IHT.

CGT Planning

Speaker: Robert Jamieson

In association with

Objectives

The major CGT changes announced in the Budget on 22 June 2010 have altered the landscape of the tax. This course will explain the effect of the new rules and will also analyse a number of other CGT problem areas.

Course Programme

The course programme for this event is determined by current issues, including:

- The new CGT rates
- Entrepreneurs' relief - a significant improvement
- Problem areas with holdover relief
- Private residence planning
- Recent tax cases

Who Should Attend?

This course is aimed at all staff who advise on CGT matters.

Charities – Accounts and Audit

Speaker: Jenny Reed

Objectives

This course acts as an update and refresher to those involved in the preparation and audit of the financial statements of charities.

Course Programme

- Charities Acts 1993 and 2006
- Regulatory framework changes
- Key aspects of charity accounting
- External scrutiny requirements
- Practice Note 11 revised
- Independent examination

Who Should Attend?

This course is aimed at all partners and staff involved in charity assignments.

Corporation Tax Refresher and Update

Speakers: Martyn Ingles, Ros Martin, Giles Mooney and Mark Ward

Objectives

This course will refresh major issues affecting Corporation Tax that you will meet in general practice and update you on any recent important changes.

Course Programme

- Overview of existing rules and reliefs
- Review of capital allowances
- Best techniques for extracting profits
- Review of interaction with Income Tax and National Insurance
- Company Tax planning
- Corporation Tax Update
- Accounting treatments and items which are an issue in Corporation Tax
- Practical points to watch out for

Who Should Attend?

This course is aimed at all fee earners involved with the taxation of companies who wish to refresh the basics and be updated on recent changes.

Current Tax Problems and Investigations Update

Speakers: Andrew Gotch, Gerry Hart, Ros Martin and Tim Palmer

Objectives

HMRC recently introduced a new compliance check regime. This is underpinned by new legislation which expands the ability of HMRC officers to access information enabling review of taxpayer's affairs. This course will consider the background to, and the experience of, the new regime to date and will discuss practical issues that have arisen since the new regime was introduced.

Course Programme

- The legislative background to compliance checks
- The practical application of these rules
- How to avoid problems for clients in managing all aspects of the regime
- Typical client pitfalls and how to spot them
- Practical solutions to common problems
- Useful resources for practitioners
- Negotiating settlements and the appeals regime in practice

Who Should Attend?

This course is aimed at all fee earners who wish to be aware of the new HMRC regime and want to understand the common problem areas and the practical solutions to these.

Dealing with Employment Law Issues

Speaker: Anne Knell

In association with

Objectives

The course aims to review those areas of employment law which create most problems for employers and to bring delegates up to date with current issues in employment law and practice which might affect them or their clients.

Course Programme

- Recruitment issues, especially avoiding discrimination, employing people from outside the EEA and the impact of the Equality Act 2010
- Terms and conditions of employment including 'fit notes' and their impact on employers' sick pay schemes
- Discrimination legislation, especially the Equality Act 2010 and the removal of the default retirement age
- Employee rights, especially 'family friendly' rights including the extension of flexible working rights and additional statutory paternity leave and pay
- Discipline, grievance and dismissal: the law and best practice in the light of the revised ACAS Code of Practice

Who Should Attend?

This course is intended for those who have responsibility for managing staff or advise clients on staff issues.

Efficient Auditing under the Clarified ISAs

Speakers: Alan Bonham, Adrian Gibbons and John Selwood

Objectives

The APB adopted the Clarified ISAs for accounting periods ending on or after the 15th December 2010 and all ISAs have been rewritten as part of the Clarity Project. This course will review the main areas of audit work affected by the changes and ensure that practitioners are fully up to date and are in a position to audit clients effectively under the new ISA requirements.

Course Programme

- Review of the Clarity Project and Auditing Practices Board pronouncements
- Groups – ISA 600
- Related Parties – ISA 550
- Estimates – ISA 540
- Control deficiencies – ISA 265
- Evaluation of misstatements – ISA 450
- Efficient planning and recording of work
- Review procedures and ensuring an efficient close down of the audit
- Practical problems and common pitfalls and how to avoid them
- Useful tips for Auditors

Who Should Attend?

This course is aimed at all Auditors who need to understand and apply the Clarified ISAs and who wish to get practical advice on how to be as efficient as possible in their work.

Finance Act 2011 and Tax Update

Speakers: Peter Bunting, Gerry Hart, Martyn Ingles, Ros Martin and Tim Palmer

Objectives

This course will explain in detail the key changes in the Finance Act 2011 with illustrations of how these changes will apply in practice and the appropriate advice strategies for clients affected by the changes.

Course Programme

- Finance Act 2011
- Details of any other key tax changes not covered by the Finance Act
- Changes in HMRC practice and case law developments relevant to the general practitioner
- Revenue practice
- Revenue interpretations
- Tax cases
- Press releases
- VAT and other developments in taxation
- Practical case studies

Who Should Attend?

This course is aimed at all fee earners who need to understand and apply the provisions of the new legislation.

Finance Act and Topical Issues Update

Speaker: Mark Ward

In association with

Objectives

The aim of this course is to familiarise participants with the provision of the Finance Act 2011. In this seminar all of the major changes in the Finance Act will be explained. In addition, there will be coverage of any additional, major developments in taxation as they affect practitioners and their clients.

Course Programme

- The major changes in the Finance Act
- Business income tax, corporation tax and personal tax
- Employee tax and national insurance contributions
- CGT
- Inheritance tax and SDLT
- VAT
- Administration and miscellaneous

Who Should Attend?

This course is aimed at general practitioners and tax specialists who need to understand and apply the provisions of the new legislation.

CPD Programme 2011 - Courses continued

Financial Reporting and Accounting Update

Speaker: Adrian Gibbons

In association with

Objectives

The aim of the course is to update delegates on the following:

- Update on current disclosure issues
- Companies Act 2006 developments
- FRS review
- FRS impact on disclosure and UK GAAP
- Recent UITF abstracts review
- Topical disclosure and accounting issues

Course Programme

- New FRSs
- IAS update and impact on UK disclosure
- Small company disclosure issues
- Implementation issues arising from Companies Act 2006
- Other general areas of interest

NB. This course is 1½ hours long. It can be attended as a standalone session or combined with the Auditing Update course, running in the same venue on the same day, to provide an Accounting and Auditing Update course.

Who Should Attend?

This course is aimed at anyone who deals with limited companies or has to understand and apply UK GAAP, including those who deal with tax issues.

General Tax Update

Speaker: Robert Neeve

In association with

Objectives

The aim of the course is to inform delegates of recent developments and topical issues which will be of relevance to general practitioners and their clients.

Course Programme

This course will include the following as appropriate to the general practitioner:

- Recent HMRC announcements and Government proposals
- Recent tax cases
- Issues of topical interest
- Income Tax
- Business Tax
- Corporation Tax
- CGT
- Inheritance Tax
- VAT
- Stamp Duty Land Tax
- NIC

Who Should Attend?

This course will be aimed at partners, managers and seniors who wish to update their knowledge on recent tax changes and developments and matters of general interest.

How to Act as Executor

Speaker: Robert Trunchion

In association with

Objectives

With the age profile of the UK likely to be that of continuing ageing for the next two decades, the role of Will and lifetime planning becomes a vital service for accountants. This course considers the important opportunities available through the use of Wills and trusts and after death. It will assume delegates have a basic knowledge of IHT and related taxes and how they work. Furthermore, in the past, many practitioners have turned down opportunities to act as executors of clients' Wills due to difficulties in obtaining probate and the need to involve another professional.

The rules that relate to obtaining probate have changed to allow some professionals other than solicitors to apply for grants of probate. However, this is not a blanket relaxation of the rules. Despite the restrictions, it is important that practitioners are able to participate in this profitable area, where you can provide a real and lasting service to your clients, and not turn such work away.

Course Programme

- Introduction and the opportunities
- Liaising with solicitors
- A review of the more relevant areas of trust and estate law including the new perpetuities rules, revisions to intestacy etc.
- Who can be an executor and how far you can go
- The six stages of probate
- Planning points illustrated with practical examples
  - "family planning" trusts
  - Getting the right structures - Will and lifetime planning using trusts
  - Thinking about what planning executors can do post death
  - The use of alternative structures instead of trusts to achieve similar results
  - Thinking "outside the box" to achieve results

Who Should Attend?

This course if aimed at anyone who will be advising clients on Wills and trusts and how to use them to their maximum advantage.

Implementing Kestrian for Clarified ISAs

Speaker: Jane Mather

In association with

Objectives

The aim of this course is to provide attendees with an understanding of the key changes in the Kestrian audit methodology due to the clarified ISAs. This will cover the 13 ISAs that have been revised as well as clarified and the new ISA on reporting internal control issues.

Course Programme

- Key changes in clarified ISAs (13 revised ISAs, 1 new ISA and the impact of the removal of ISA pluses)
- Changes to the Kestrian documentation to reflect clarified ISAs
- Understanding the impact of these changes on the performance and documentation of audit work
- Guidance on how the audit can be carried out in the most efficient way so that the changes do not have a significant impact on the fee/recoverability

Who Should Attend?

This course is aimed at all principals and staff who use Kestrian as their audit system.

Implementing PCAS for Clarified ISAs

Speaker: David Norris

In association with

Objectives

The aim of this course is to provide attendees with an understanding of the key changes in the PCAS audit methodology due to the clarified ISAs. This will cover the 13 ISAs that have been revised as well as clarified and the new ISA on reporting internal control issues.

Course Programme

- Key changes in clarified ISAs (13 revised ISAs, 1 new ISA and the impact of the removal of ISA pluses)
- Changes to the PCAS documentation to reflect clarified ISAs
- Understanding the impact of these changes on the performance and documentation of audit work
- Guidance on how the audit can be carried out in the most efficient way so that the changes do not have a significant impact on the fee/recoverability

Who Should Attend?

This course is aimed at all principals and staff who use PCAS or the PCAS documentation in ProAudit as their audit system.

Legal and Regulatory Update

Speaker: Louise Dunford

In association with

Objectives

The course provides a practical update on all the most relevant recent legislation and legal cases impacting on practice.

Course Programme

- Types of director and directors' duties
- Members, shares and minority protection
- Insolvency issues
- Money laundering and Bribery Act 2010
- Employment status and employment contracts
- Unlawful discrimination, Equality Act 2010

Who Should Attend?

This course is aimed at all accountants advising small and medium sized businesses.

Making Money under Clarified ISAs

Speaker: Adrian Gibbons

In association with

Objectives

This course looks at some of the cost issues created by the clarified ISAs. By understanding what the ISAs require us to do we can cut down on unnecessary work and form filling. This should benefit recoveries on the work. The main benefit from attending this course will be some ideas on how to make more money from your audits.

Course Programme

- The emphasis within the ISAs is now focused on planning. This course will consider the impact of that on the budget and look at the benefits you should get from better planning.
- The clarity ISAs add additional procedures in to the planning and also the core audit work.
- An understanding of these new procedures and the impact they may have on the audit approach will be important to getting the cost under control when the clarity ISAs are adopted.

Who Should Attend?

This course is aimed at all principals, managers and staff involved in audit work.

Management and Financial Advice for SMEs

Speaker: Nigel Smith

In association with

Objectives

The course will equip participants with practical techniques to help SMEs improve their profitability and liquidity.

Course Programme

- Practical Cashflow Management
- Advice on how to get paid
- The importance of breakeven
- Cost benefit analysis
- Banking relationships

Who Should Attend?

This course is designed for all staff who are in contact with SME clients and who want to expand the range of services they provide. NB This course will be of limited use to partners and others experienced in this field.

Practical Tax Case Studies

Speaker: Robert Neeve

In association with

Objectives

The aim of this course is to enable delegates to appreciate the various taxes that come into play when a transaction or event occurs.

Course Programme

Topics will be selected from:

- An individual beginning to trade
- Taking on a partner
- The incorporation of a business
- Extraction of funds
- Depending upon time available other topics may be added

Who Should Attend?

This course is aimed at those who would like to gain an understanding of the tax implications of a particular transaction or event.

Practical Use of Trusts

Speaker: Robert Neeve

Objectives

This course will enhance and extend the general practitioner's understanding of the use of trusts. The course will consider Income Tax, Inheritance Tax and CGT.

Course Programme

The course will include the following as appropriate to the general practitioner:

- Bare trusts: taxation and use
- Settlor interested trusts: an introduction to the tax consequences
- Gifts with reservation and pre-owned assets
- Insurance policies
- Adding assets to established trusts
- Deeds of variation

Who Should Attend?

This course is aimed at non-specialists who wish to develop their basic knowledge of the taxation of trusts.

CPD Programme 2011 - Courses continued

Small Company Reporting Issues

Speakers: Alan Bonham, Roger Bryant, Peter Herbert and John Selwood

Objectives

This course will update those issues which are important to the accountant acting for small companies.

Course Programme

- Update on eligibility for small company exemptions
- The proper use of the FRSSE
- Any changes in the reporting requirements of small companies
- IFRS Update
- Practical financial reporting problems experienced by small companies
- Accounting policy selection and disclosure
- Problem accounting issues
- Practical solutions to common issues

Who Should Attend?

This course is aimed at all fee earners involved in the preparation of small company accounts who wish to keep up to date with the latest accounting standards.

Tax Implications of Transactions between a Company and its Directors

Speaker: Kevin Read

In association with

Objectives

The correct tax treatment of transactions involving directors and their companies remains a difficult and complex area. Recent increases in income and capital gains tax rates have made it even more important for those dealing with small companies to understand the different issues involved in such transactions. This course will discuss various scenarios that delegates will come across in practice and will consider several different taxes.

Course Programme

- Directors loan accounts
  - Compliance issues
  - Avoiding tax charges
- Expense payments to directors
- Transferring assets to/from a company
  - Income tax, Corporation tax, CGT and Inheritance Tax implications of sales/gifts
- Renting a property to your company
  - is it tax-efficient?
  - have you considered the effects for all the taxes?
- Using a share buy-back as an exit route from a company
- Review of recent case law

Who Should Attend?

This course is aimed at those who wish to update their knowledge in this area.

Tax Issues of Buying and Selling Businesses

Speaker: Robert Trunchion

Objectives

The point at which a business is sold or bought presents high risk to the tax practitioner. Being up to date with the current best practice is essential. This course is intended to look at relevant issues on this subject.

Course Programme

- Pre-sale planning
- Changing the client structure before sale, such as shareholdings, legal format and transfer of assets
- CGT
- Entrepreneur's relief
- Extraction of profits before sale
- Sale to third parties
- Sale to family members
- Retirement planning
- Tax issues of using pension funds in sale and purchase of businesses
- How to shelter and defer capital gains
- Inheritance tax issues
- Management buyouts
- Buying and selling unincorporated businesses
- Succession planning

The course only looks at issues that affect the sale of SMEs.

Who Should Attend?

This course is aimed at tax specialists and qualified accountants advising clients who are considering buying and selling of businesses .

Tax Planning for 5 April 2011 / Tax Planning for the New Client – Start up, Growth and Exit

Speaker: Martyn Ingles

Tax Planning for 5 April 2011

Objectives

The course reviews current problem areas with particular focus on recent and impending developments, and potential problem areas.

Course Programme

- Tax issues requiring urgent attention before 5 April 2011
- PAYE and benefits in kind issues
- CGT tax planning
- Capital allowances and business expenditure issues
- Furnished holiday letting issues
- Tax issues related to pension planning
- Company tax issues e.g. payment of bonuses, dividends etc
- Other topical tax issues

Who Should Attend?

The course is designed for all practitioners and staff with clients who will be required to submit year-end returns or take tax planning action before 5 April 2011.

Tax Planning for the New Client – Start up, Growth and Exit

Objectives

This course is designed as an update on the tax issues affecting the new client or start up with emphasis on establishing the correct structures for maximum tax efficiency.

Course Programme

The course will draw its contents from:

- What is the correct vehicle? Company, LLP, partnership or sole trader - who should own the shares?
- Role of spouses, family members, alphabet shares, income shifting considerations
- Pre-trading losses
- Capital allowances
- Ownership of properties
- CGT issues if a rapid exit is planned
- VAT issues
- Tax efficient use of early losses

Who Should Attend?

The course is designed for all partners and managers involved in tax planning for new clients.

Tax Planning for Family Companies

Speakers: Peter Bunting, Gerry Hart, Martyn Ingles and Mark Ward

Objectives

The tax efficient extraction of profit from the family company has become more and more important as tax rates continue to rise. This course explores the current best techniques to ensure that you know the most tax efficient routes.

Course Programme

- Choosing the right structure for your client
- Revenue extraction: bonus vs. dividend vs. salary vs. pension
- Timing of payments
- Dividend Waivers
- Payments to family members
- Capital extraction
- Update on definition of a business asset
- Retirement planning
- New pension rules
- Possible income shifting considerations
- Use of corporate losses
- Use of trusts in family tax planning

Who Should Attend?

This course is aimed at all those involved in advising family companies and who wish to be up to date with the latest in tax planning knowledge.

Taxation of Land and Property

Speaker: Giles Mooney

Objectives

The course gives comprehensive coverage of the tax issues revolving around land and property.

Course Programme

- The definition of land and property for tax purposes
- CGT considerations
- Tax planning for the purchase
- CGT on disposals
- Tax relief on loans
- Treatment of rental income
- Rent-a-room relief
- Capital Allowances Act
- Repairs and renewals
- Property leases
- Stamp duty land tax
- Capital vs. revenue and property improvements
- Issues determining which legal entity should own the property
- Tax issues for properties owned by limited companies.

Who Should Attend?

This course is aimed at all fee earners dealing with land and property tax related issues.

Valuations of Unquoted Companies and Businesses

Speaker: Jenny Nelder

In association with

Objectives

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

Course Programme

- Bases of and factors affecting valuation
- Principles from statute and case law
- Valuing different sizes of shareholdings
- Negotiating with HMRC - Shares and Assets Valuation
- The information standard
- Valuation of employment related securities
- Valuing shares at 31 March 1982 or other base dates
- Goodwill
- Possible approaches to and considerations in valuations for non fiscal purposes, including commercial, litigation and divorce

Who Should Attend?

This course is aimed at partners, managers and staff who may become involved with share valuation issues.

VAT Hot Topics

Speaker: Mike Thexton

In association with

Objectives

The aim of this course is to update delegates on the latest VAT saving tips and on common pitfalls business owners face.

Course Programme

VAT is famously a simple tax, collected by traders from customers and passed on to the Government so it doesn't cost the business anything. In case you don't believe that, these sessions cover tips for saving VAT and warnings about the tax's many pitfalls.

- VAT problems with property
- To opt or not to opt, that is the question
- Small business schemes
- Cars and car expenses
- Paperwork problems

Who Should Attend?

This course is aimed at anyone involved in client work and who wants to be in a better position to advise business owners on VAT.

VAT Update and Current Problem Areas

Speaker: Neil Warren

Objectives

This course will update practitioners and review problem areas they may come across on a regular basis with SME clients and at the same time highlight key changes in VAT legislation and case law that may affect them in these areas.

Course Programme

- Overview of existing VAT rules
- Registration and business splitting issues
- When to charge output tax and at what rate
- Input tax recovery
- Partial exemption
- Land and buildings (including option to tax)
- Transfer of a going concern
- Flat rate scheme
- Topical areas of special interest
- Significant new developments
- Update on the penalty regime in practice
- Practical guidance on key problem areas

Who Should Attend?

This course is aimed at all fee earners coming across VAT issues in their daily work.

Practice Management and Development 2011

The Practice Management and Development programme is taking place at various locations around the UK and Ireland. 2020 Premier Members are entitled to free attendance at some of these seminars and Associate Members 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 and Members Conference. Non members are welcome to attend any of these seminars (except the Members Conference).

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 the Managing Partner Programme, Marketing, Information Technology and a Professional Development Programme for any future partners in your firm.

Courses for 2011

Practice Management and Development 2011 - Seminars

National Events

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
10 Mar 11	Members Conference	£195/€234	£195/€234	n/a	Hilton Coventry	09.30 to 17.30
04 Apr 11	Professional Development Programme	£1400/€1680	£1400/€1680	£1400/€1680	London	09.30 to 17.30
18 May 11	Information Technology Focus Group	£295/€355	£295/€355	£295/€355	Arden Hotel NEC Birmingham	09.30 to 17.30
19 May 11	Managing Partner Programme	£385/€462	£385/€462	£385/€462	Marriott Forest of Arden	09.30 to 17.30
23 May 11	Marketing Focus Group	£295/€355	£295/€355	£295/€355	Arden Hotel NEC Birmingham	09.30 to 17.30
24 May 11	Upstream Academy Focus Group	£385/€462	£385/€462	£385/€462	Marriott Forest of Arden	09.30 to 17.30
26 May 11	Tax Conference	£149	£179	£199	London	09.30 to 17.30
02 Jun 11	Managing Partner Programme	£385/€462	£385/€462	£385/€462	To Be Confirmed	09.30 to 17.30
06 Jul 11	Cutting Edge Focus Group	£385/€462	£385/€462	£385/€462	To Be Confirmed	09.30 to 17.30
05 Jul 11	Small Firms Conference	£99/€119	£125/€150	£149/€179	London	09.30 to 17.30
13 Oct 11	Annual Conference	£205/€246	£205/€246	£255/€306	Hilton Birmingham Metropole	09.30 to 17.30
07 Nov 11	Professional Development Programme	£1400/€1680	£1400/€1680	£1400/€1680	Arden Hotel NEC Birmingham	09.30 to 17.30
30 Nov 11	Information Technology Focus Group	£295/€355	£295/€355	£295/€355	Arden Hotel NEC Birmingham	09.30 to 17.30
01 Dec 11	Managing Partner Programme	£385/€462	£385/€462	£385/€462	Marriott Forest of Arden	09.30 to 17.30
05 Dec 11	Marketing Focus Group	£295/€355	£295/€355	£295/€355	Arden Hotel NEC Birmingham	09.30 to 17.30
06 Dec 11	Upstream Academy Focus Group	£385/€462	£385/€462	£385/€462	Marriott Forest of Arden	09.30 to 17.30
13 Dec 11	Managing Partner Programme	£385/€462	£385/€462	£385/€462	To Be Confirmed	09.30 to 17.30

East

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
08 Jun 11	Successful Wealth Management	£60	£80	£95	Hilton Cambridge	14.00 to 17.30

Ireland

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
09 May 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Gresham Hotel Dublin	14.00 to 17.30
10 May 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Park Avenue Hotel, Belfast	14.00 to 17.30
09 Jun 11	Managing Partner Programme	£295/€355	£295/€355	£295/€355	Crowne Plaza Dublin Airport	09.30 to 17.30
12 Jul 11	How to Build a £1 Million Practice	£99/€119	£125/€150	£149/€179	Gresham Hotel Dublin	09.30 to 17.30
27 Sep 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Gresham Hotel Dublin	14.00 to 17.30
28 Sep 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Park Avenue Hotel, Belfast	14.00 to 17.30
08 Dec 11	Managing Partner Programme	£295/€355	£295/€355	£295/€355	Crowne Plaza Dublin Airport	09.30 to 17.30

London

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
16 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Russell Square House, London	14.00 to 17.30
04 May 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Russell Square House, London	14.00 to 17.30
21 Sep 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Russell Square House, London	14.00 to 17.30
18 Oct 11	Thinking of Buying, Selling or Merging an Accountancy Practice?	£149/€179	£179/€215	£199/€239	Russell Square House, London	09.30 to 17.30
22 Nov 11	Successful Wealth Management	£60	£80	£95	Hilton Dartford Bridge	14.00 to 17.30

Midlands

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
23 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Arden Hotel NEC Birmingham	14.00 to 17.30
17 May 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Arden Hotel NEC Birmingham	14.00 to 17.30
07 Jun 11	Successful Wealth Management	£60	£80	£95	Leicester City Football Club	14.00 to 17.30
13 Jul 11	Thinking of Buying, Selling or Merging an Accountancy Practice?	£149/€179	£179/€215	£199/€239	Arden Hotel NEC Birmingham	09.30 to 17.30
26 Sep 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Arden Hotel NEC Birmingham	14.00 to 17.30

Please note: All prices are net of VAT

Practice Management and Development 2011 - Seminars

North East / West

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
15 Feb 11	Successful Wealth Management	£60	£80	£95	Newcastle United Football Club	14.00 to 17.30
18 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Holiday Inn Bolton	09.30 to 13.00
12 May 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Holiday Inn Bolton	14.00 to 17.30
16 Jul 11	Sole Practitioner Masterclass	£99/€119	£125/€150	£149/€179	Holiday Inn Bolton	09.30 to 17.30
19 Sep 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Holiday Inn Bolton	14.00 to 17.30
20 Oct 11	How to Build a £1 Million Practice	£99/€119	£125/€150	£149/€179	Holiday Inn Bolton	09.30 to 17.30

Scotland

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
16 Feb 11	Successful Wealth Management	£60	£80	£95	Premier Inn Glasgow Airport	14.00 to 17.30
11 May 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Hilton Edinburgh Grosvenor	14.00 to 17.30
29 Sep 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Hilton Edinburgh Grosvenor	14.00 to 17.30

South East

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
24 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Mercure London Gatwick	14.00 to 17.30
05 May 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Mercure London Gatwick	14.00 to 17.30
22 Sep 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Mercure London Gatwick	14.00 to 17.30
04 Oct 11	Successful Wealth Management	£60	£80	£95	Holiday Inn Eastleigh Southampton	14.00 to 17.30
05 Oct 11	Successful Wealth Management	£60	£80	£95	Ramada Guildford	14.00 to 17.30
19 Oct 11	Sole Practitioner Masterclass	£99/€119	£125/€150	£149/€179	Mercure London Gatwick	09.30 to 17.30

South West

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
22 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Hilton Bristol	14.00 to 17.30
27 Apr 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Hilton Bristol	14.00 to 17.30
27 Sep 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Hilton Bristol	14.00 to 17.30

Wales

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
17 Feb 11	Successful Wealth Management	£60	£80	£95	Park Inn, Cardiff	14.00 to 17.30

Yorkshire and the Humber

Date	Title	Premier Member	Associate Member	Non Member	Venue	Time
17 Mar 11	Managing and Growing a Top Class Professional Services Firm	free	£56/€67	£120/€144	Holiday Inn Leeds Garforth	14.00 to 17.30
28 Apr 11	Delivering Exceptional Client Service	free	£56/€67	£120/€144	Holiday Inn Leeds Garforth	14.00 to 17.30
14 Jul 11	How to Build a £1 Million Practice	£99/€119	£125/€150	£149/€179	Holiday Inn Leeds Garforth	09.30 to 17.30
20 Sep 11	2011 Marketing Workshop	free	£56/€67	£120/€144	Holiday Inn Leeds Garforth	14.00 to 17.30

Please note: All prices are net of VAT

13th 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 speaker 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 14 October 2011, there is an optional half day session. This session is free of charge for Thursday attendees.

The conference commences at 09.30 on 13th October and finishes at 12.30 on 14th October 2011.

Date	Location
13 and 14 October 2011	Hilton Birmingham Metropole

Basic 8 hour conference rate, including lunch:
Premier Members £205 / €246 plus VAT
Associate Members £205 / €246 plus VAT
Non Members £255 / €306 plus VAT

For those delegates wishing to stay for dinner, there is an additional charge of £55 / €60 plus VAT

Delivering Exceptional Client Service

Speaker: Ian Fletcher

Keeping your existing clients 'happy' is the easiest way to grow a professional services firm. If you have 'happy' clients, they are more likely to buy more services from you and refer you to potential clients.

US marketing guru Michael Le Boueff once said "Upset a customer and they will tell 11 other people about it!"

Learn how to stand out from the crowd by attending this seminar and identify opportunities to excel in client service.

Key Topics

- What clients really want
- What is exceptional client service?
- The seven steps to keeping clients 'happy'
- Systemising your service delivery to optimise client satisfaction
- The personal touch
- Getting 'happy clients' to refer you
- Preparing and delivering a client service plan

Date	Location
27 April 2011	Bristol
28 April 2011	Leeds
04 May 2011	London
05 May 2011	Gatwick
19 September 2011	Bolton

Date	Location
26 September 2011	Birmingham
27 September 2011	Dublin
28 September 2011	Belfast
29 September 2011	Edinburgh

All seminars run from 14.00 to 17.30

Premier Members free

Premier Member additional delegates £30 / €36 plus VAT
Associate Members £56 / €67 plus VAT
Non Members £120 / €144 plus VAT

How to Build a £1 Million Practice

Speaker: Chris Frederiksen

The opportunities for accounting professionals to build a large and successful practice in today's market are unprecedented. With the recent turmoil in the economy, clients are more willing than ever to make a change and are seeking out cost-effective, value-added providers. Most accountants don't do any marketing at all – so if you just do a few things, you're ahead of the pack! And most of these techniques cost very little to implement. Your speaker, Chris Frederiksen, has designed this course based on his experience in building a number of very successful practices in his career.

Key Topics

- Why a £1,000,000 practice?
- Why is marketing important?
- The 3 Rules of Marketing
- The 4-letter word you will never use again
- Specialisation, focus and branding
- Using technology to leverage your marketing efforts
- How to make your current clients your "ambassadors"
- Developing the right marketing materials
- The right way to do direct mail (samples provided)
- Successful uses of telemarketing
- Easy ways to build your referral network
- Getting the marketing support you need
- Putting together your action plan

This seminar is for accountants and tax professionals who want to learn proven marketing techniques to build their practice with high quality clients. Seminar attendees will receive a comprehensive manual which includes checklists, forms, sample marketing pieces and direct mail letters.

Date	Location
12 July 2011	Dublin
14 July 2011	Leeds
20 October 2011	Bolton

All seminars run from 09.30 to 17.30

Premier Members £99 / €119 plus VAT
Associate Members £125 / €150 plus VAT
Non Members £149 / €179 plus VAT

Practice Management and Development 2011 - Seminars continued

Managing and Growing a Top Class Professional Services Firm

Speaker: Chris Frederiksen

Our research indicates that one third of business owners are now more willing than ever to change accountants and that they are seeking out providers who can offer real value at a reasonable and predictable cost.

With a few simple steps, you can take full advantage of the opportunities that exist right now to gain new clients. Just as important is the effective management of your practice to keep your current clients happy and to improve profitability.

This seminar will show you how to meet your clients' needs and expectations and manage your firm so that it achieves its true potential.

Key Topics

- Designing a five-year growth plan
- What services are really in demand?
- Which services are easiest to expand?
- Best marketing strategies to fit your market
- Business advisory services that add value
- Electronic workflow systems
- Cloud technology is here to stay
- New ideas on document management
- Latest hardware and software update
- Specialisation, focus and branding
- Establish a direct marketing program
- Who's going to make it happen?
- What are your support options?
- Working ON your practice
- Designing and implementing your action plan

"If everything seems under control, you're not going fast enough."

Mario Andretti

Date	Location
16 March 2011	London
17 March 2011	Leeds
*18 March 2011	Bolton
22 March 2011	Bristol
23 March 2011	Birmingham
24 March 2011	Gatwick

All seminars run from 14.00 to 17.30 except * Bolton which runs from 09.30 to 13.00.

Premier Members free
Premier Member additional delegates £30 / €36 plus VAT
Associate Members £56 / €67 plus VAT
Non Members £120 / €144 plus VAT

2011 Marketing Workshop

Speaker: Gordon Gilchrist

As a professional you are perfectly positioned to provide a comprehensive solution to your clients' business and personal needs.

This seminar will focus on the latest and most successful services your clients need, want and will pay for! It will show you how to develop a modern and sophisticated marketing plan to promote your firm by industry sector and by the services you offer.

Key Topics

- Proven marketing strategies that work!
- How to develop your marketing plan for existing clients and potential-clients
- Developing a niche
- Which services do clients value most and hence your firm gets the highest reward?
- Measuring the effectiveness of your marketing activities
- Using technology to get 'the edge' and maximise results
- How social media is catching on and what that means for your firm
- Choosing the right partners to help you win new clients
- Networking opportunities
- The value to your firm of Client Satisfaction Surveys
- Direct marketing; databases, mailshots, telemarketing, websites and client portals
- Preparing and controlling your plan with proper management information

Date	Location
09 May 2011	Dublin
10 May 2011	Belfast
11 May 2011	Edinburgh
12 May 2011	Bolton
17 May 2011	Birmingham
20 September 2011	Leeds
21 September 2011	London
22 September 2011	Gatwick
27 September 2011	Bristol

All seminars run from 14.00 to 17.30.

Premier Members free
Premier Member additional delegates £30 / €36 plus VAT
Associate Members £56 / €67 plus VAT
Non Members £120 / €144 plus VAT

Members Conference

Speakers: Chris Frederiksen, Ian Fletcher and Gordon Gilchrist

The 2020 Members Conference is a one day conference, providing member firms with the latest marketing and practice management solutions.

Key Topics

- 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.
- Problem solving break-out sessions – bring your toughest problems and join delegates from like-sized firms in a small group to discuss problems, generate solutions and share ideas.
- Delegates will provide feedback from the breakout sessions and discuss ideas.

This conference is exclusive to members and 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
10 March 2011	Hilton Coventry

The conference commences at 09.30 and finishes at 17.30.

Premier and Associate Members £195 / €234 plus VAT
Non Members – this conference is exclusively for 2020 Members

Practice Management and Development 2011 - Seminars continued

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 2011.

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 for success together

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

Date	Location
05 July 2011	London

The conference commences at 09.30 and finishes at 17.30.

Premier Members £99 / €119 plus VAT
Associate Members £125 / €150 plus VAT
Non Members £149 / €179 plus VAT

Sole Practitioner Masterclass

Speaker: Chris Frederiksen

Having your own practice is the most satisfying and rewarding activity for a professional accountant.

Even if you are not a sole practitioner, you will get huge benefit from attending this seminar by learning new ideas and techniques to make more money.

Key Topics

- Getting out of the "BUSY" box
- Technology and document management
- Going paperless and how to do it
- The revenue equation
- Good staff – where are they?
- The move to outsourcing
- Buying a practice or block of fees and how to structure the deal
- Marketing techniques for small firms
- Next steps – your action plan

Date	Location
16 July 2011	Bolton
19 October 2011	Gatwick

The conference commences at 09.30 and finishes at 17.30.

Premier Members £99 / €119 plus VAT
Associate Members £125 / €150 plus VAT
Non Members £149 / €179 plus VAT

Successful Wealth Management

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

Date	Location	Date	Location
15 February 2011	Newcastle	08 June 2011	Cambridge
16 February 2011	Glasgow	04 October 2011	Southampton
17 February 2011	Cardiff	05 October 2011	Guildford
07 June 2011	Leicester	22 November 2011	Dartford

All seminars run from 14.00 to 17.30.

Premier Members £60 plus VAT
Associate Members £80 plus VAT
Non Members £95 plus VAT

Tax Conference

Speakers: Ian Fletcher, Gordon Gilchrist, Gerry Hart and Peter Legg

With a new Government and 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
- HMRC investigation trends and tactics
- Minimising the risk of a tax investigation
- Keeping the risk of a PII claim as low as possible
- The latest tax strategies and their effectiveness
- New tax planning tips, practical tools and spreadsheets
- Trusts and their use in tax planning

Date	Location
26 May 2011	London

The conference commences at 09.30 and finishes at 17.30.

Premier Members £149 plus VAT
Associate Members £179 plus VAT
Non Members £199 plus VAT

Practice Management and Development 2011 - Seminars continued

Thinking of Buying, Selling or Merging an Accountancy Practice?

Speaker: Chris Frederiksen

Merger and acquisition activity amongst accountancy firms is at the highest level we have ever seen. Some firms are seeking to increase profitability and fuel growth. Some are looking at mergers and acquisitions to offer greater opportunity to their staff and better serve their clients. Some are doing an acquisition to replace clients lost in the economic downturn. Others are ready to retire and are looking to transition themselves out of the profession.

Your speaker, Chris Frederiksen, has built and sold several accountancy firms of his own and has assisted hundreds of other firms in buying, selling or merging.

Date	Location
13 July 2011	Birmingham
18 October 2011	London

The conference commences at 09.30 and finishes at 17.30.

Premier Members £149 / €179 plus VAT
Associate Members £179 / €215 plus VAT
Non Members £199 / €239 plus VAT

Key Topics

- Where and how to find practices to buy
- How to value an accountancy practice
- Types of services and their impact on a firm's value
- Practice size – is bigger necessarily better?
- Current payment terms and financing options
- Contingency and "claw back" arrangements
- A typical deal – how long does it take?
- Non-compete clauses
- Where and how to find the right buyer
- Merger and acquisition industry update
- Continuing involvement of seller - the pros and cons
- How to notify clients
- Avoiding the "pig in a poke" situation
- How to merge successfully
- Practice valuation for new partners buying in
- Typical merger and de-merger provisions

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 some groups actually 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 discussion and often discover new resources.

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.

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

Information Technology Focus Group

Facilitator: Gordon Gilchrist

The Information Technology focus group provides a unique opportunity for the development of relationships with like-minded practices. You will be able to share a wide range of IT ideas with the specific objective of helping to improve your IT offering to clients and your own internal IT efficiency.

The agenda for the day is flexible to the needs of those attending but may include such items as:

- What the smart firms are focusing on today
- Budgets - what are firms spending and on what?
- How to define and focus on performance
- The key to maximising IT returns
- The best way to involve everybody in the firm
- Understanding exactly what to change internally
- Using IT to systemise and improve workflows and performance on Auditing, Practice Management and Marketing

Date	Location
18 May 2011	Birmingham
30 November 2011	Birmingham

Timings - from 09.30 to 17.30.

Cost £295/€355 plus VAT

Marketing Focus Group

Facilitator: Gordon Gilchrist

The Marketing Focus Group continues to be a most 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 of helping to market your own firm.

The agenda for the day is variable but may include:

- Websites, client portals, social media and how it all inter-relates
- What the smart firms are focusing on today
- Where the best returns are coming from
- How to define and focus on potentially great clients
- The key to referrals
- The best way to involve everybody in the firm
- Understanding exactly what to change internally

Date	Location
23 May 2011	Birmingham
05 December 2011	Birmingham

Timings - from 09.30 to 17.30.

Cost £295/€355 plus VAT

Managing Partner Programme

Facilitator: Gordon Gilchrist

The Managing Partner Programme is for partners in go-ahead accountancy firms who are committed to growth, profitability and moving forward. At each meeting, group members discuss their accomplishments, explore their challenges and opportunities and make commitments about initiatives that will improve their firms. Prior participants report excellent progress in their firms.

Full day only meeting

Timings - from 09.30 to 17.30.

Cost £295/€355

Managing Partner - Ireland

Date	Location
09 June 2011	Dublin
08 December 2011	Dublin

The following focus groups are all a working dinner the night before a full day meeting

Timings – Dinner and Full Day 09.30 to 17.30.

Cost £295/€355 plus VAT
There is an additional cost of £90/€108 plus VAT (representing an equal share of the costs of dinner).

Managing Partner - UK

Date	Location
02 June 2011	To Be Confirmed
13 December 2011	To Be Confirmed

Managing Partner - XV

Date	Location
19 May 2011	Birmingham
01 December 2011	Birmingham

The following focus groups are all a working dinner the night before a full day meeting

Timings – Dinner and Full Day 09.30 to 17.30.

Cost £295/€355 plus VAT
There is an additional cost of £90/€108 plus VAT (representing an equal share of the costs of dinner).

Upstream Academy Focus Group

Facilitator: Gordon Gilchrist

This continues to be the best forum for partners in go-ahead firms to meet like-minded accountants and share a wide ranging list of practice development ideas with the specific objective to help to develop your own firm. This focus group has been operating for several years with longstanding participants but there are typically 1 or 2 places available.

Date	Location
24 May 2011	Birmingham
06 December 2011	Birmingham

Cutting Edge Focus Group

Facilitators: Chris Frederiksen and Gordon Gilchrist

The Cutting Edge Focus Group is for highly profitable firms (averaging over £300,000 profit per partner) who are typically, but not exclusively, larger, multi-partner firms. This gathering focuses on the unique concerns and issues facing these firms.

This focus group has been operating for several years with longstanding participants but there are typically 1 or 2 places available.

Date	Location
06 July 2011	To Be Confirmed

Professional Development Programme

Speaker: Gordon Gilchrist

This programme is expressly designed for fee earners with potential (who may be partners designate) to excel, ensuring firms benefit from their input and maybe even address any succession issues they may have. It includes a comprehensive leadership, practice development, client satisfaction training and added value programme. 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
- Understanding the commerciality of an accounting practice
- Leadership
- Understanding marketing, productivity and communications with clients
- Generating new assignments and being proactive
- Building value in the business
- Selling skills
- How to get things done
- Creating time to develop the business

Many firms are thinking about getting through 2011 and how their succession plans will be affected. They are looking towards their younger partners and managers as their successors. One major concern is whether they are equipped to take on all the tasks required of a partner today and an understanding of what the future holds and, whether they have the skills to take the firm on successfully. As a result, we have developed a training programme that has the following key attributes:

- Consistently increases revenue and profits
- Build self-confidence
- Demonstrate commitment to younger professionals
- Includes the day-to-day activities in the working environment
- The teaching style is designed to ensure participants are working to share their experience so that we achieve a deeper learning experience

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

Date	Location
04 April 2011	London
07 November 2011	Birmingham

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

The Professional Development Programme will run from 09.30 to 17.30.

Cost £1,400 / €1,680 plus VAT

2020 Webinar Programme 2011

Delegates are invited to participate in webinars using their own pc where they can view the presentation and use the telephone to listen to the speaker.

For further details and to register on a webinar, please visit www.the2020group.com/webinars

Date	Time	Webinar	Speaker	2020 Premier / Associate Member	Non Member
17 Jan 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
04 Feb 11	10.00 – 11.30	2020 Tools – Part 1	Ian Fletcher	free	n/a
07 Feb 11	10.00 – 11.00	Quarterly Audit and Accounts Update	Guy Loveday	£49	£69
14 Feb 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
28 Feb 11	10.00 – 11.30	Quarterly Marketing Update	Gordon Gilchrist	£49/€59	£69/€83
04 Mar 11	10.00 – 11.30	Quarterly FSA Update	Ian Fletcher	£49	£69
07 Mar 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
01 Apr 11	10.00 – 11.30	2020 Tools – Part 2	Ian Fletcher	free	n/a
04 Apr 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
09 May 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
16 May 11	10.00 – 11.00	Quarterly Audit and Accounts Update	Guy Loveday	£49	£69
20 May 11	10.00 – 11.30	Quarterly Marketing Update	Gordon Gilchrist	£49/€59	£69/€83
03 Jun 11	10.00 – 11.30	Quarterly FSA Update	Ian Fletcher	£49	£69
06 Jun 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
10 Jun 11	10.00 – 11.30	2020 Tools – Part 3	Ian Fletcher	free	n/a
04 Jul 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
01 Aug 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
05 Aug 11	10.00 – 11.00	Quarterly Audit and Accounts Update	Guy Loveday	£49	£69
02 Sep 11	10.00 – 11.30	Quarterly FSA Update	Ian Fletcher	£49	£69
09 Sep 11	10.00 – 11.30	2020 Tools – Part 4	Ian Fletcher	free	n/a
12 Sep 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
19 Sep 11	10.00 – 11.30	Quarterly Marketing Update	Gordon Gilchrist	£49/€59	£69/€83
03 Oct 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
07 Nov 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69
11 Nov 11	10.00 – 11.30	2020 Tools – Part 5	Ian Fletcher	free	n/a
16 Nov 11	10.00 – 11.00	Quarterly Audit and Accounts Update	Guy Loveday	£49	£69
28 Nov 11	10.00 – 11.30	Quarterly Marketing Update	Gordon Gilchrist	£49/€59	£69/€83
02 Dec 11	10.00 – 11.30	Quarterly FSA Update	Ian Fletcher	£49	£69
05 Dec 11	10.00 – 11.00	Monthly Tax Update	Gerry Hart	£49	£69

For a full list of webinars please visit www.the2020group.com/webinars

Please note: The above prices are net of VAT

Speakers 2011

For further details and full information regarding our speakers please visit **www.the2020group.com**

Alan Bonham

Alan is a Chartered Accountant and independent training consultant specialising in audit and accounting topics. He was Managing Director of Pentagon Training Ltd before it was acquired by SWAT in October 2005. Alan is one of the few lecturers who can make auditing interesting. He also advises firms on their audit procedures and offers practical help in achieving compliance in a cost-effective manner.

Roger Bryant

After spells in practice, banking and the academic world, Roger now divides his time between lecturing, writing, and acting as a consultant for a number of accountancy practices. Since 1980 he has been a regular contributor to the course programmes of the major accountancy bodies and their district societies, other leading training organisations and many individual firms.

Peter Bunting

Peter is a Chartered Certified Accountant and associate of PTP with over 10 years experience of giving accountancy and taxation advice to SMEs. He provides training on a range of topical tax issues, looking at practical examples on issues faced by the modern practitioner.

Louise Dunford

Louise has been continuously involved in training and consultancy since 1987, both for professional firms and for commercial organisations, and for the last 6 years has also worked through Complete HR Ltd providing HR advice and representation to small businesses.

Louise works with a number of national training companies providing CPD training for accountants in commerce and in private practice. She has also engaged in management training, particularly in employment and HR, for a great many commercial companies. For some years Louise worked as an associate senior lecturer at the University of Portsmouth where she was mainly engaged on postgraduate teaching on the MBA, MA Personnel Management and MA Business Law, and still retains an association with the University which has led to teaching for Institute of Personnel Management Courses in Jersey and for the Cayman Islands Government. Louise specialises mainly in aspects of practical employment law, in company law and professional negligence, and has published widely in leading academic and professional journals.

Ian Fletcher

Ian Fletcher is a Chartered Accountant having trained at the London office of a "Big 4" international practice. Ian is a well known lecturer and business consultant and has gained a reputation for his entertaining style and practical approach to practice management. Ian majors in management issues, specifically dealing with the systemisation of accounting practices. He is the co-author of the ICAEW's book "Building the Value Added Practice", and together with Gordon Gilchrist, is co-author of the Croner.CCH book "SME Consulting". Ian is also a holder of the Chartered Insurance Institute's Financial Planning Certificate.

Chris Frederiksen

Chris Frederiksen is one of the best-known and most highly-rated seminar leaders in the world as well as a consultant to accountancy firms worldwide. He is also a practising accountant in San Francisco, California. His experience includes partnership positions with two international CPA firms and building several independent practices in the San Francisco Bay Area. As a consultant for the past twenty years, he has been helping small and medium sized accountancy firms achieve their goals of greater profitability and greater personal satisfaction for the owners. He is now committed to helping CAs and tax professionals excel in financial services, strategic planning and other new service areas.

Adrian Gibbons

Adrian is the Business Development Director of SWATUK. He joined the company in 1986, having qualified with the East Anglia practice Larking Gowen. During his years with SWATUK, Adrian has worked with medium sized practices in developing their audit and accounts control procedures. He is the board director responsible for SWATUK's London office. Outside work he is a keen sailor and has recently been elected as a parish councillor for the village that he lives in. Adrian is a very entertaining speaker who lectures regularly on audit and accountancy topics for the ICAEW, ACCA, District Societies and other training groups.

Gordon Gilchrist

Gordon Gilchrist is recognised as a global leading consultant to accountancy firms in the areas of marketing, strategic planning, practice management and increasingly succession issues including buying, selling and merging of accountancy practices. He trained as an accountant in the UK and later worked with Grant Thornton. He has been consulting with firms in the UK, Ireland and South Africa since 1989 and has worked with three of the Top 4 firms, 75% of the Top 20, and over 2,000 independent firms. Gordon is a well recognised and accomplished speaker for annual conferences and staff training days. He has accumulated some brilliant ideas which can be heard at his seminars. He and Ian Fletcher are joint authors of the Croner.CCH book "SME Consulting".

Andrew Gotch

Andrew came into taxes through the Inland Revenue's fast stream in 1988. He left the Revenue in 1994 as an Assistant District Inspector and co-founded Professional Tax Practice Ltd in 1995 to dispense advice to professional firms of accountants and lawyers. He joined the Professional Training Partnership (PTP) in 1997 and since then has been advising clients, contributing articles on technical issues to the professional press and lecturing widely to professional audiences all over the UK. Andrew left PTP in 2006 and now practices as a Chartered Tax Adviser, writer and lecturer through his own firm TaxFellowship. He is a member of the CIOT's Employment and OMB Technical Sub-Committees and has been involved in several consultations and forums with HMRC.

Malcolm Greenbaum

Malcolm is a UK Chartered Accountant and Chartered Tax Advisor. He was previously Director of Finance and Taxation Programmes at BPP Professional Education and has delivered IFRS, US GAAP, UK Tax and VAT training to a multitude of organisations world-wide since 1992. Malcolm has particular experience in delivering bespoke training programmes to multinationals in the financial services, transport and energy sectors as well as delivering UK tax and VAT update programmes to accounting and law firms. He is passionate about training and his enthusiasm ensures that the participants enjoy the learning experience whilst gaining knowledge through their engagement in the sessions and through encouraging them to ask questions and discuss practical issues they may have.

Gerry Hart

Gerry is an experienced Chartered Tax Adviser who provides technical tax support to other professional advisers such as accountants and solicitors and over the years he has created and developed several tax practices. He is a prolific lecturer on a variety of tax subjects, with an enthusiastic style ensuring that delegates get the most out of his presentation.

Peter Herbert

Peter qualified as a chartered accountant with KPMG. He worked for The Financial Training Company for 6 years, the last three as a senior manager in the London office, responsible for developing courses for corporate clients. Peter presents courses to accountancy firms, companies and financial institutions. Peter's areas of technical expertise are financial reporting, auditing and practice regulation. He also writes and delivers financial analysis and personal development programmes for a range of blue chip and private companies.

Martyn Ingles

Martyn worked for FTC Ltd for ten years lecturing in taxation and other accounting subjects. His main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. Martyn has had articles published in the Tax Faculty TaxLine Technical Review and in Taxation Magazine and has also been involved in the production of tax training videos for Legal Network Television.

Robert Jamieson

After qualifying as a Chartered Accountant, Robert moved to Financial Training where he ran their specialist tax course and tax consultancy divisions. He joined the Council of The Chartered Institute of Taxation in 1993 and became their President in May 1999. He is on the Editorial Board of the weekly magazine "Taxation" and was one of the original Series Editors for Croner's Tax Handbooks.

Speakers 2011 - continued

Anne Knell

Anne is a partner in Newways 90, an HR consultancy offering a broad range of personnel advice and support to clients in all sectors of business. She was previously with Arthur Andersen working with clients on HR and employment law related issues. She gained her personnel experience at Morphy-Richards and Chesebrough-Ponds and also headed up the courses department for the National Institute of Industrial Psychology. She is the executive editor of Gee's Personnel Manager's Factbook and a contributor to its on-line Consult Gee HR.

Guy Loveday

Guy specialises in Auditing and Financial Reporting updates for accountants in practice and industry, and in finance courses for members of the wider financial community. He also provides a consultancy service to assist companies in preparing their annual financial statements and has assisted a number of listed companies in preparing for the transition to International Accounting Standards.

Ros Martin

Ros Martin CTA is a consultant and lecturer covering all aspects of direct tax and Stamp Duty Land Tax. She was an Inland Revenue fully trained Inspector until 2000 when she left to become a consultant advising on tax planning for large and small businesses and individuals as well as dealing with full and aspect enquiry work. Her clients are mainly small and medium sized accountants and the consultancy work gives a particular opportunity to understand the key issues of concerns for such professionals and consider the practical aspects of the application of legislation.

Jane Mather

Jane joined Hodgson Harris, a 12 partner practice, in 1984 and qualified as a Chartered Accountant in 1987. In the practice, which became Price Waterhouse, Jane was an audit and accounts manager. Jane is now the Divisional Director for the Northern region of SWATUK and her work includes audit, accounts and IB reviews and she has a particular interest in training and lecturing.

Giles Mooney

Giles is a Chartered Accountant and Chartered Tax Adviser who has been involved in UK tax training for 9 years. He started his career with a small firm of accountants and tax advisers, before working as a director of a large professional training company. He has written for a number of publications on various UK tax and business issues including writing PTP's own monthly publication – Professional Tax Update. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He joined PTP in January 2004 and was made a partner of The Professional Training Partnership in January 2007 and is also a Director of PTP Ltd.

Robert Neeve

Robert Neeve qualified as a Chartered Accountant in 1979. He has been a Senior Tax Manager with Ernst & Whinney and Pannell Kerr Foster where in both firms he was involved in in-house training and client seminars. Robert set up his own tax practice in 1992 and now concentrates on lecturing in taxation for CIOT examinations and CPD courses.

Jenny Nelder

Jenny Nelder is a chartered accountant and partner in Bruce Sutherland & Co, an independent firm of unquoted company share and business valuation specialists. She has been involved in valuing shares and businesses since 1981 when she left Touche Ross (now Deloitte). She lectures on share and business valuations for a number of professional bodies and contributes articles on the subject to the professional press. Her experience includes negotiation with HMRC - Shares and Assets Valuation, writing Reports for the Court, particularly for the purposes of matrimonial and shareholder disputes, either as a single joint expert or for one party and appearing in Court as an expert witness, acting as an independent valuer under Articles of Association or Shareholders' Agreements and the preparation of reports for and negotiation of values for the purposes of purchases and sales of companies or shareholdings. She is a member of the Society of Share and Business Valuers.

David Norris

David graduated from Exeter University with a BA in Accountancy and joined a small 5 partner firm of Chartered Accountants, where he qualified as a Chartered Accountant. His role at the firm was split between audit work, maintaining the office network and training clients in the use of Sage and QuickBooks accounting packages. Having been with the firm for 6 years, David left to join SWATUK in May 2000 and is primarily involved in carrying out audit and practice assurance reviews and lecturing audit, accountancy and IT courses.

Tim Palmer

Tim is one of the UK's best known and popular tax presenters. He lectures frequently all over the UK on a wide variety of taxation subjects. He has been presenting such tax lectures for 25 years now! He also writes regular magazine articles for the leading taxation publications. Alongside his lecturing, Tim also provides tax consultancy services and specialist tax advice. Tim is also the Tax Technical Director of CIS Tax Advice Ltd, providing tax support to the Construction Industry, for contractors and subcontractors alike. Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm to their clients. He was also a member of the tax department of P&O where he specialised in Corporation Tax and the Construction Industry.

Kevin Read

Kevin is a Chartered Accountant who qualified with PwC, spending his last 18 months in its Corporate Tax department. In 1989 he moved into full-time professional training with BPP and has operated as a freelance tutor and training consultant since 1992.

Kevin covers a broad range of tax areas, from corporate groups to trusts and offshore matters. He is a regular speaker on CPD courses for a cross-section of professional advisors, including accountants, lawyers, stockbrokers and financial advisors.

As well as teaching and writing course material, he contributes towards text books and is a co-author of an annual Budget publication.

Jenny Reed

Jenny graduated from Cambridge University in 1996 with a chemistry degree. She joined the audit department of KPMG's St Albans office where she qualified as a Chartered Accountant in 1999. She then moved back to Cambridge and joined Grant Thornton, specialising in the audit of large owner-managed businesses, charities and pension schemes. Having been promoted to Audit Manager in 2001, she stayed for a further three years before becoming Finance Director at Britten Sinfonia. Jenny joined SWATUK in the autumn of 2005, specialising in audit and financial reporting issues with a particular interest in the charity/not-for-profit sector.

John Selwood

John is a Chartered Accountant and independent training consultant who lectures for the major training accountancy companies and publishers. He speaks on money laundering, auditing and financial reporting and writes technical material for publishers. Previously, he has been the technical partner for a top thirty firm of accountants and head of CharterGroup, the accountancy network.

Nigel Smith

Nigel is a partner in the Financial and Management Training Consultancy which he established 28 years ago. He has lectured all over the world from Buenos Aires to Beijing (where he was a visiting Professor). He has worked with both large and small businesses and has specialised in advising newly formed businesses on their financial and management set up. He is the author of 5 diploma programmes in financial management. He is currently the bursar of a preparatory school where he has been part of a team that turned the school from a loss of £250k to a surplus of £450k in three years!

Mike Thexton

Mike Thexton trained as a chartered accountant with Deloitte Haskins + Sells in London. He took first place in the PEII final exam in July 1983, also taking the prize for the Advanced Taxation paper and the Worshipful Company's prize for the year. The next year, he won the John Wood medal for the highest marks in the Business Taxation paper in the Chartered Institute of Taxation's associateship exam. Mike moved into his firm's training department after qualifying, and then became a freelance lecturer. After six years specialising in exam training, he moved increasingly into presenting current developments courses for qualified practitioners.

In 1993, when the Chartered Institute of Taxation introduced a qualification route for VAT specialists, he was asked to run courses for this exam for a Big 5 firm of accountants, and increasingly specialised in VAT. Mike now presents regular VAT updates for the specialist staff of several large and medium-sized firms of accountants in the UK and for the US-based staff of another firm, as well as the staff of a multinational oil company. He still maintains an interest and involvement in general tax developments and has a number of personal and business tax clients, so he can bring a broad knowledge of tax developments into his VAT courses. He writes the Quarterly VAT Update on CD-ROM for Butterworths LexisNexis. In addition to VAT and general tax developments, Mike has for a number of years presented courses on capital gains tax for investment professionals, and he is a member of the editorial board of Taxation magazine.

Robert Trunchion

Bob is a tax principal with MacIntyre Hudson LLP and is one of their tax lecturers. Bob qualified as a Chartered Accountant with Coopers and Lybrand (now PWC) where he specialised in corporate taxes. He has a wide range of tax knowledge and lectures on a range of subjects including the tax implications of buying and selling companies, capital tax planning, trusts and share valuation. He is also a specialist in a number of industries.

Mark Ward

Mark qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium size firm. Since 1993, he has been lecturing on a wide variety of tax matters to both students and qualified practitioners. Mark was admitted as a partner of the Professional Training Partnership in January 1999.

Neil Warren

Neil Warren spent 14 years as an inspector in HM Customs and Excise before setting up his own tax and accounting practice in 1997. During the last twelve years, he has been the main VAT consultant for a number of practices in the south east of England. He has developed a reputation for being able to simplify complex VAT problems, giving straightforward advice in plain English. As well as VAT consultancy work, Neil also writes on VAT for most of the leading tax publications in the UK. Neil is also a member of the main Council and VAT Technical Committee of the ATT (Association of Taxation Technicians).

Dean Wootten

Dean has been involved in tax training since 1994 and lectures on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying in 1988 and then as an Associate of the Institute of Taxation in 1991. After qualifying Dean spent a number of years in practice, including over five years at partner level. The experience gained whilst in practice enables Dean to focus his lecturing on the practical aspects of the issues presented.

Registration Form

The 2020 Training Directory 2011

2020 Innovation

Please photocopy this form as needed

Contact details

Company / Organisation

Address

Postcode

Contact Name | Tel

Email | Fax

Payment details

I enclose a cheque made payable to 2020 Group for £

Please charge my Delta ☐ Visa ☐ Maestro ☐ Mastercard ☐

Name on card

Card No.

Issue No. Start Date Exp Date

Amount

Cardholder's signature

Please add billing address below if different to the address above

Postcode

I wish to book the following

Date	Course Title	Delegate Name	Location	Cost

Please return this registration form with any payment due to:

2020 Group
6110 Knights Court, Solihull Parkway
Birmingham Business Park, Birmingham
West Midlands B37 7WY

Tel +44 (0) 121 314 1234 or +353 (0) 1 876 4870
Fax +44 (0) 121 314 4718
Email: seminars@the2020group.com
www.the2020group.com

or

2020 Group
Ulysses House, Foley Street
Dublin 1 Ireland

Subtotal	£/€
VAT	£/€
Total	£/€

Please add VAT at the current rate

For delegates based in and attending seminars in the Republic of Ireland, please supply your VAT number to

Terms and Conditions

By completing and returning this registration form, you are agreeing to the terms and conditions of booking which can be found at www.the2020group.com/terms

Data Protection Act

By returning the 2020 seminar booking form, you agree to 2020 Innovation Group Ltd processing and storing your data for the provision of products and services, analysis and administration purposes. We may use your details to send you information about other products or seminars. If you do not wish to receive such

2020 Group

United Kingdom
6110 Knights Court, Solihull Parkway
Birmingham Business Park, Birmingham
West Midlands B37 7WY
Tel +44 (0) 121 314 2020
Fax +44 (0) 121 314 4718

Republic of Ireland
Ulysses House, Foley Street
Dublin 1 Ireland
Tel +353 (0) 1 876 4870
Fax +44 (0) 121 314 4718

Please note: All prices are net of VAT

ACCOUNTING FOR YOUR PAPERWORK

DOCUMENT MANAGEMENT FOR ACCOUNTANCY PRACTICES FROM LINDENHOUSE

virtualcabinet
DOCUMENT MANAGEMENT

Saves time • Improves efficiency • Saves money
Improves customer service • Saves storage space
Allows remote working • Provides disaster recovery

"We chose Virtual Cabinet because of its ease of use, powerful search facilities, flexibility and integration with our IRIS accounting system. This, in particular, allows us to file and retrieve information directly from IRIS at the touch of a button."

Peter White - Stewart Fletcher & Barrett

Virtual Cabinet is an affordable, easy to use, highly effective document management system.

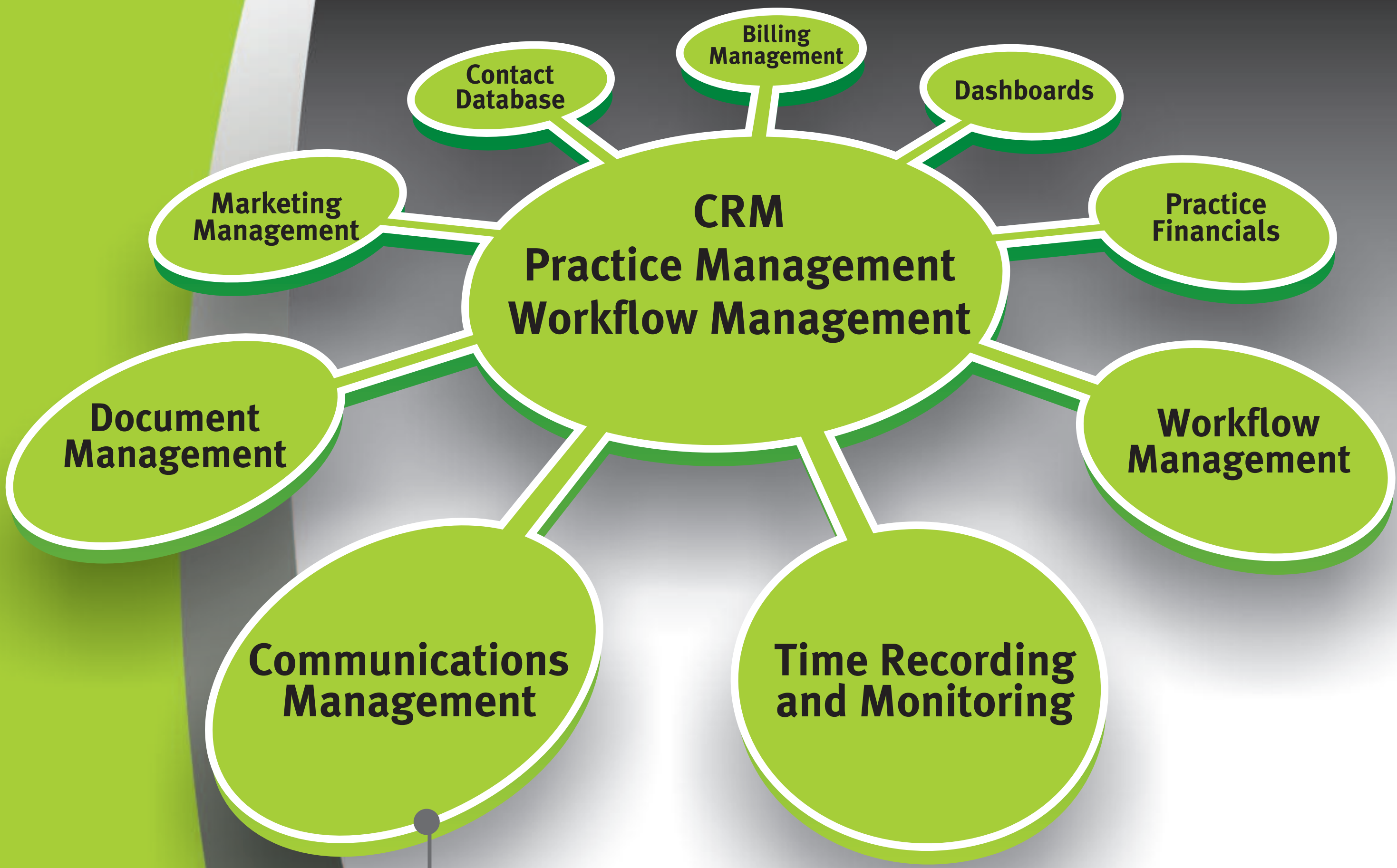
SHORTLISTED accountingWEB Software Satisfaction Awards 2010 Best Practice Management Software

WINNER accountingWEB Software Satisfaction Awards 2009 Winner Best Practice Management Software

WINNER accountingWEB Software Satisfaction Awards 2008 Winner Best Practice Management Software

Best Practice
Management Software

The Complete Accountants Package



Key Features of Module

- Record Phone Calls
- Record Emails
- Record Diary Appointments
- Record Faxes
- Record Notes for File
- Record Tasks
- Record Scanned Documents
- Send SMS Messages
- Track Communications
- Attach Accounts
- Attach Tax Returns
- TAPI Integration

relate software

Relate Software
UK Tel. +44 871 284 3446
ROI Tel. +353 1 4597800
info@relate-software.com
www.relate-software.com