



SESCA

Accounting, Taxation and Business Courses

Quality, verifiable, flexible
accountancy and business training

Your key to professional knowledge

2026 CPD PROGRAMME

2026 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
2026	Ethics - Practising Professionalism	J.Williams	76	W	ANY	ET01A6
2026	Ethics - Ethical Decision-Making for Accountants in Business Refresher	J.Williams	77	W	ANY	ET02A6
2026	Ethics - Ethical Decision-Making for Accountants in Practice Refresher	J.Williams	77	W	ANY	ET03A6
2026	Why Power Query is the Most Important Development Ever - Even if You Don't Work with Data!	S.Hurst	86	W	ANY	EX01A6
2026	Good Spreadsheet Practice - Excel Fundamentals	S.Hurst	87	W	ANY	EX02A6
2026	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	88	W	ANY	EX03A6
2026	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	89	W	ANY	EX04A6
2026	More Power to Your Pivot - Practical Uses for Excel Pivot Tables	S.Hurst	90	W	ANY	EX05A6
2026	Essential Word Productivity Skills and Techniques for Accountants	S.Hurst	91	W	ANY	WD01A6
2026	New Employee Word and Excel Productivity Courses Bundle	S.Hurst	92	W	ANY	WE02A6
26 Feb	Hot Topics in VAT	N.Owen	38	O	AM	FE26A6
26 Feb	Complete Guide to Tax Planning for Small Businesses	M.Ward	11	O	PM	FE26B6
03 Mar	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	56	O	AM	MA03A6
03 Mar	Companies Act Refresher	J.Selwood	59	O	PM	MA03B6
04 Mar	PAYE and National Insurance Update	A.Durrant	12	O	AM	MA04A6
04 Mar	Introduction to Pension Scheme Accounts	M.Norbury	68	O	PM	MA04B6
05 Mar	A Practical Approach to Forms P11D	A.Durrant	13	O	AM	MA05A6
06 Mar	Introduction to Charity Accounts	P.Herbert	66	O	AM	MA06A6
10 Mar	Tax Efficient Extraction of Funds from the Family Business	T.Palmer	26	O	AM	MA10A6
11 Mar	Impact of Brexit and the Subsequent EU - UK Agreements on Business and Taxation	J.Mindell	23	O	AM	MA11A6
12 Mar	LLP Refresher and Update	P.Herbert	60	O	AM	MA12A6
12 Mar	Capital Gains Tax for Owner Managed Businesses	M.Ward	32	O	PM	MA12B6
13 Mar	Pension Accounting, Audit and Regulatory Update	M.Norbury	69	O	AM	MA13A6
17 Mar	Common Issues from Audit Cold File Reviews and How to Avoid Them	K.McCaffrey	64	O	AM	MA17A6
17 Mar	Hot Topics in International Tax	J.Mindell	22	O	PM	MA17B6
18 Mar	SRA Accounts Rules Annual Update	J.Taylor	58	O	AM	MA18A6
18 Mar	PAYE and National Insurance Update	A.Durrant	12	O	PM	MA18B6
19 Mar	Complete Guide to International VAT Issues	N.Owen	39	O	DAY	MA19D6
24 Mar	Tales of the Unexpected: VAT Cases with Outcomes Good and Bad	N.Owen	43	O	AM	MA24A6
24 Mar	A Practical Approach to Forms P11D	A.Durrant	13	O	PM	MA24B6
25 Mar	Pensions - What the Accountant Needs to Know	M.Ingles	28	O	AM	MA25A6
26 Mar	Businesses in Trouble - Helping Your Clients in Times of Crisis	P.Ridgway	80	O	AM	MA26A6
14 Apr	IHT - Beyond the Basics	M.Ward	31	O	AM	AP14A6
15 Apr	Complete Guide to Acting for Small Businesses	M.Ingles	27	O	AM	AP15A6
16 Apr	HMRC Investigations	J.Mindell	20	O	AM	AP16A6
16 Apr	Employment and Business Law Update	L.Dunford	72	O	PM	AP16B6
21 Apr	Essential Guide to Share and Business Valuations	D.Bowes	78	O	AM	AP21A6
21 Apr	The Art of Open Source Intelligence: Unlocking the Digital World	S.Hill	85	O	PM	AP21B6
22 Apr	Corporation Tax Update	G.Mooney	19	O	AM	AP22A6
22 Apr	Effective Narrative Reporting	V.Steward	53	O	PM	AP22B6
23 Apr	Annual IFRS Update	G.Loveday	52	O	AM	AP23A6
23 Apr	Complete Guide to VAT and Property Transactions	N.Owen	41	O	PM	AP23B6
28 Apr	Charity Audit and Independent Examination Update	P.Herbert	67	O	AM	AP28A6
28 Apr	Topical Tax Issues for Owner Managed Businesses	M.Ward	10	O	PM	AP28B6
29 Apr	Trusts: Update and Planning Using Client Case Studies	A.Fisher	34	O	AM	AP29A6
29 Apr	Tax Planning in Difficult Economic Times	G.Mooney	18	O	PM	AP29B6
06 May	The Accountant on the Farm - A Comprehensive Review	D.Missen & G.Pilcher	21	O	AM	MY06A6
06 May	Housing Associations Accounting and Audit Update	V.Steward	70	O	PM	MY06B6
07 May	Capital Taxes Update	M.Ward	33	O	AM	MY07A6
07 May	Complete Guide to Tax and the Family	M.Ward	25	O	PM	MY07B6
08 May	Complete Guide to Essential VAT for Charities	N.Owen	40	O	AM	MY08A6
11 May	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	55	O	PM	MY11B6
12 May	Taxation Update	G.Mooney	7	O	AM	MY12A6
12 May	Audit and Accounting Update	G.Loveday	48	O	PM	MY12B6
12 May	Accounting and Financial Reporting Update	G.Loveday	49	O	AM	MY12C6

2026 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
12 May	Taxation Update	G.Mooney	7	O	PM	MY12D6
15 May	GenAI in Audit and Assurance	P.Beard	61	O	AM	MY15A6
19 May	Accounting Update for Accountants in Business	G.Loveday	50	O	AM	MY19A6
19 May	Taxation Update for Accountants in Business	M.Ingles	8	O	PM	MY19B6
20 May	Accounting Update for Accountants in Business	G.Loveday	50	D	AM	MY20A6
20 May	Taxation Update for Accountants in Business	M.Ingles	8	D	PM	MY20B6
21 May	A Practical Accounting Brush Up for Returners	K.McCaffrey	51	O	AM	MY21A6
21 May	A Practical Tax Brush Up for Returners	R.Benneyworth	9	O	PM	MY21B6
21 May	Topical Issues in Insolvency Seminar	Various	99	D	DAY	MY21D6
02 Jun	VAT Pitfalls and Solutions	D.Wooten	37	O	AM	JN02A6
02 Jun	MTD for Income Tax - It's Here!	R.Benneyworth	17	O	PM	JN02B6
03 Jun	Accounting and Financial Reporting Update	G.Loveday	49	M	AM	JN03A6
03 Jun	Taxation Update	M.Ward	7	M	PM	JN03B6
04 Jun	Complete Guide to VAT in the Construction Sector	N.Owen	42	O	AM	JN04A6
04 Jun	Guarding the Ledger - Cyber Security and Data Protection	S.Hill	83	O	PM	JN04B6
09 Jun	Taxation Update	J.Mindell	7	O	AM	JN09A6
09 Jun	Accounting and Financial Reporting Update	G.Loveday	49	O	PM	JN09B6
09 Jun	Audit and Accounting Update	G.Loveday	48	O	AM	JN09C6
09 Jun	Taxation Update	J.Mindell	7	O	PM	JN09D6
10 Jun	Charity Trusteeship: Getting it Right for Finance Professionals	C.D'cruz	75	O	AM	JN10A6
10 Jun	Dealing with Common Property Transactions	M.Ward	36	O	PM	JN10B6
11 Jun	Complete Guide to the Partial Exemption and the Capital Goods Scheme	N.Owen	44	O	AM	JN11A6
11 Jun	Payroll Services for Clients - Practical Problems	A.Durrant	14	O	PM	JN11B6
15 Jun	Accounting Update for Accountants in Business	G.Loveday	50	CB	AM	JN15A6
15 Jun	Taxation Update for Accountants in Business	M.Ingles	8	CB	PM	JN15B6
16 Jun	Accounting for and Auditing Academy Schools Update	J.Charlton	57	O	AM	JN16A6
16 Jun	MTD for Income Tax - It's Here!	R.Benneyworth	17	O	PM	JN16B6
17 Jun	Taxation Update	M.Ward	7	O	AM	JN17A6
17 Jun	Audit and Accounting Update	G.Loveday	48	O	PM	JN17B6
17 Jun	Accounting and Financial Reporting Update	G.Loveday	49	O	AM	JN17C6
17 Jun	Taxation Update	M.Ward	7	O	PM	JN17D6
18 Jun	Managing Change	T.Trevett	81	O	AM	JN18A6
19 Jun	Taxation Update for Accountants in Business	M.Ingles	8	O	AM	JN19A6
19 Jun	Accounting Update for Accountants in Business	G.Loveday	50	O	PM	JN19B6
24 Jun - 26 Jun	Taxation Conference 2026	Various	46	KU	C	JN24C6
26 Jun	Tax Conference - Topical Tax Tips and Pitfalls*	G.Mooney	45	KU	AM	JN26A6
29 Jun	Accounting Update for Accountants in Business	G.Loveday	50	P	AM	JN29A6
29 Jun	Taxation Update for Accountants in Business	M.Ingles	8	P	PM	JN29B6
29 Jun	Taxation Update	J.Mindell	7	P	AM	JN29C6
29 Jun	Audit and Accounting Update	G.Loveday	48	P	PM	JN29D6
02 Jul	AI for Accountants: How the Finance Function Could Be Improved	S.Hill	84	O	AM	JY02A6
02 Jul	Construction Industry Tax Refresher	T.Palmer	35	O	PM	JY02B6
08 Jul	Complete Guide to Tax Planning for Small Businesses	M.Ward	11	O	AM	JY08A6
09 Sep	A Practical Tax Brush Up for Returners	R.Benneyworth	9	O	AM	SE09A6
09 Sep	A Practical Accounting Brush Up for Returners	K.McCaffrey	51	O	PM	SE09B6
10 Sep - 11 Sep	Insolvency Conference 2026	Various	99	RU	C	SE10C6
15 Sep	Topical Tax Issues for Owner Managed Businesses	M.Ward	10	O	AM	SE15A6
15 Sep	Hot Topics in VAT	N.Owen	38	O	PM	SE15B6
16 Sep	Payroll Services for Clients - Practical Problems	A.Durrant	14	O	AM	SE16A6
16 Sep	Capital Gains Tax and Inheritance Tax Refresher	M.Ward	30	O	PM	SE16B6
17 Sep	Acting for Doctors Update	N.Stevenson	29	O	AM	SE17A6
17 Sep	Trusts: Update and Planning Using Client Case Studies	A.Fisher	34	O	PM	SE17B6
18 Sep	Introduction to Root Cause Analysis	K.McCaffrey	65	O	AM	SE18A6
22 Sep	Complete Guide to Acting for Small Businesses	M.Ingles	27	O	AM	SE22A6
22 Sep	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	56	O	PM	SE22B6
24 Sep	Essential Guide to Tax Issues on Buying, Selling and Closing Down Businesses	K.Read	24	O	DAY	SE24D6
29 Sep	Judgement and Scepticism - Improving the Audit Approach	R.Tiffin	62	O	AM	SE29A6
29 Sep	Pensions - What the Accountant Needs to Know	M.Ingles	28	O	PM	SE29B6

2026 COURSES & CONFERENCES PROGRAMME

DATE	COURSE	SPEAKER	PAGE	VENUE	TIME	CODE
01 Oct	A Practical Introduction to Payroll	A.Durrant	15	O	AM	OC01A6
01 Oct	IR35 - Where are we now?	T.Palmer	16	O	PM	OC01B6
06 Oct	Essential Guide to Share and Business Valuations	D.Bowes	78	O	AM	OC06A6
06 Oct	Capital Taxes Update	M.Ward	33	O	PM	OC06B6
07 Oct	Employment and Business Law Update	L.Dunford	72	O	AM	OC07A6
07 Oct	Annual IFRS Update	G.Loveday	52	O	PM	OC07B6
08 Oct	Corporation Tax Update	G.Mooney	19	O	AM	OC08A6
08 Oct	Topical Audit Problems and Solutions	J.Selwood	63	O	PM	OC08B6
09 Oct	A Practical Approach to Forms P11D	A.Durrant	13	O	AM	OC09A6
13 Oct	Complete Guide to VAT and Property Transactions	N.Owen	41	O	AM	OC13A6
13 Oct	Problems Commonly Encountered under IFRS and FRS 102 - and Solutions!	G.Loveday	54	O	PM	OC13B6
14 Oct	Dealing with Common Property Transactions	M.Ward	36	O	AM	OC14A6
14 Oct	Generating More Fees from Advisory Services	M.Lee	79	O	PM	OC14B6
15 Oct	GenAI in Audit and Assurance	P.Beard	61	O	AM	OC15A6
15 Oct	Topical Issues in Insolvency Seminar	Various	99	D	DAY	OC15D6
20 Oct	Tax Planning in Difficult Economic Times	G.Mooney	18	O	AM	OC20A6
21 Oct	Charities Update	J.Rowe	73	O	AM	OC21A6
21 Oct	Charities Legal Update	C.D'cruz	74	O	PM	OC21B6
22 Oct	Complete Guide to International VAT Issues	N.Owen	39	O	DAY	OC22D6
03 Nov	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	55	O	AM	NO03A6
04 Nov	Construction Industry Tax Refresher	T.Palmer	35	O	AM	NO04A6
05 Nov	Complete Guide to Tax and the Family	M.Ward	25	O	AM	NO05A6
05 Nov	Complete Guide to VAT in the Construction Sector	N.Owen	42	O	PM	NO05B6
10 Nov	Taxation Update	G.Mooney	7	O	AM	NO10A6
10 Nov	Audit and Accounting Update	G.Loveday	48	O	PM	NO10B6
10 Nov	Accounting and Financial Reporting Update	G.Loveday	49	O	AM	NO10C6
10 Nov	Taxation Update	G.Mooney	7	O	PM	NO10D6
11 Nov	Charities Update	J.Rowe	73	O	AM	NO11A6
11 Nov	Charities Legal Update	C.D'cruz	74	O	PM	NO11B6
12 Nov	Capital Gains Tax for Owner Managed Businesses	M.Ward	32	O	AM	NO12A6
12 Nov	VAT Pitfalls and Solutions	D.Wootten	37	O	PM	NO12B6
16 Nov	Taxation Update for Accountants in Business	M.Ingles	8	O	AM	NO16A6
16 Nov	Accounting Update for Accountants in Business	G.Loveday	50	O	PM	NO16B6
17 Nov	Taxation Update for Accountants in Business	M.Ingles	8	D	AM	NO17A6
17 Nov	Accounting Update for Accountants in Business	G.Loveday	50	D	PM	NO17B6
18 Nov	Tax Efficient Extraction of Funds from the Family Business	T.Palmer	26	O	AM	NO18A6
18 Nov	IHT - Beyond the Basics	M.Ward	31	O	PM	NO18B6
19 Nov	Taxation Update for Accountants in Business	M.Ingles	8	CB	AM	NO19A6
19 Nov	Accounting Update for Accountants in Business	G.Loveday	50	CB	PM	NO19B6
20 Nov	Common Issues from Audit Cold File Reviews and How to Avoid Them	K.McCaffrey	64	O	AM	NO20A6
23 Nov	Taxation Update	M.Ward	7	O	AM	NO23A6
23 Nov	Accounting and Financial Reporting Update	G.Loveday	49	O	PM	NO23B6
23 Nov	Audit and Accounting Update	G.Loveday	48	O	AM	NO23C6
23 Nov	Taxation Update	M.Ward	7	O	PM	NO23D6
24 Nov	Managing Conflict and Confrontation	T.Trevett	82	O	AM	NO24A6
25 Nov	Taxation Update for Accountants in Business	M.Ingles	8	P	AM	NO25A6
25 Nov	Accounting Update for Accountants in Business	G.Loveday	50	P	PM	NO25B6
25 Nov	Accounting and Financial Reporting Update	G.Loveday	49	P	AM	NO25C6
25 Nov	Taxation Update	G.Mooney	7	P	PM	NO25D6
27 Nov	Accounting Update for Accountants in Business	G.Loveday	50	O	AM	NO27A6
27 Nov	Taxation Update for Accountants in Business	M.Ingles	8	O	PM	NO27B6
01 Dec	Taxation Update	G.Mooney	7	M	AM	DE01A6
01 Dec	Audit and Accounting Update	G.Loveday	48	M	PM	DE01B6
03 Dec	Taxation Update	M.Ward	7	O	AM	DE03A6
03 Dec	Audit and Accounting Update	G.Loveday	48	O	PM	DE03B6
03 Dec	Accounting and Financial Reporting Update	G.Loveday	49	O	AM	DE03C6
03 Dec	Taxation Update	M.Ward	7	O	PM	DE03D6

KEY

Time: AM=09:30–12:30, PM=13:30–16:30, *=09:15–12:30 DAY = Timings vary – see individual course information
 C=Conference – see individual conference information For key to venues see page 99 ● = Not available on flexiticket

2026 SESCA CPD PROGRAMME

Book and pay by 31st Jan to beat the price increase

Fees

	Fee	VAT	Total
5 place Flexiticket (purchased and paid for by 31/01/26 – ticket will expire 31/12/26)	£335.00	£67.00	£402.00
5 place Flexiticket	£345.00	£69.00	£414.00
12 place Flexiticket (purchased and paid for by 31/01/26 – ticket will expire 31/12/26)	£780.00	£156.00	£936.00
12 place Flexiticket	£804.00	£160.80	£964.80
25 place Maxiticket (purchased and paid for by 31/01/26 – ticket will expire 31/12/26)	£1550.00	£310.00	£1860.00
25 place Maxiticket	£1600.00	£320.00	£1920.00
Individual course (half day)	£110.00	£22.00	£132.00
Whole day course (p24 & 39)	£185.00	£37.00	£222.00
'Brush-ups' with discount (p9 & 51)	£55.00	£11.00	£66.00
Ethics: Practising Professionalism (p76) (Or one place on the Flexiticket if also attending Ethics: Ethical Decision-Making for Business or Practice Refresher course p77)	£33.00	£6.60	£39.60
Ethics: Ethical Decision-Making for Business or Practice Refresher (p77) (Or one place on the Flexiticket if also attending Ethics: Practising Professionalism course p76)	£43.00	£8.60	£51.60
New Employee Word & Excel Productivity Courses Bundle (p92)	£110.00	£22.00	£132.00
Charities courses with discount (p73 & 74 – both courses)	£110.00	£22.00	£132.00
Tax Conference	£400.00	£80.00	£480.00
Tax Conference early booking discount (booked and paid for by 30/04/26)	£380.00	£76.00	£456.00
Insolvency Conference	£350.00	£70.00	£420.00
Insolvency Conference early booking discount (booked and paid for by 31/05/26)	£335.00	£67.00	£402.00
Topical Issues in Insolvency Seminar (Either May or Oct)	£200.00	£40.00	£240.00
Topical Issues in Insolvency Seminars (Both May & Oct)	£350.00	£70.00	£420.00

To book please email courses@sesca.co.uk, visit the website www.sesca.co.uk or call 01737 223999.

All bookings must be accompanied by payment. A VAT invoice will be issued with your confirmation email.

Details for BACS payment:

a/c 10771791

Sort code: 20-23-97

Please quote company name when paying by BACS

SESCA is the trading name of SESCA Limited.
A subsidiary of CASE, the South Eastern Society
of Chartered Accountants Ltd

Website: www.sesca.co.uk

Email: courses@sesca.co.uk

Tel: 01737 223999

Return address:

SESCA Ltd,

2B Chart House, Effingham Road,
Reigate, Surrey RH2 7JN



SESCA

THE FLEXITICKET EXPLAINED

The Flexiticket offers one of the best value for money CPD discount schemes. Places are transferable and may be used by any number of individuals from different organisations, allowing smaller and sole practitioners and members in business to 'club together'.

- Tickets are valid for up to 13 months, for example if the first course booked takes place in March 2026 your ticket will start on 1 March 2026 and will expire on 31 March 2027. Flexitickets purchased and paid for on or before 31 January 2026 are at the 2025 rate and will expire on 31 December 2026 (see page 4).
- Places must be used on courses which take place within the validity period of the ticket.
- All courses are verifiable. Individual CPD reports are sent each January, but reports may be requested at any time.
- Face-to-face courses are held at Dorking, Maidstone, Portsmouth and Bracknell.
- All live online courses are provided using Zoom.
- The Flexiticket is valid on all half day and whole day courses.
- Book and reserve places at any time. You will not be invoiced until the 1st of the month in which the first course you wish to attend takes place, allowing you to book your places well in advance.
- The places can be used by any number of individuals on any number of courses totalling the number of places on the Flexiticket.
- A course place must be cancelled by email, and acknowledged by us, at least two clear working days before the course date to enable you to use the place on another course within the validity period of your ticket. Alternatively, you may request the documentation. If you choose to be sent the documentation this will constitute use of one place on your ticket. If no prior notice of cancellation is received and you do not attend, you will be sent the course materials using one place on your ticket.
- No refunds are made on places not used.
- Call or email at any time to find out how many places you have left on your Flexiticket.
- Apply via our website, by post, email or phone for a Flexiticket or course place. You will receive an email confirming your Flexiticket bookings and a VAT invoice.
- You will be emailed the Zoom link and course materials, in PDF format, two days before each live online course date.
- You will be emailed a reminder of all venue-based courses one week before the course date. Course documentation will be provided at the venue.
- For more information on any course or the Flexiticket please visit our website www.sesca.co.uk, call 01737 223999 or email courses@sesca.co.uk
- Full terms and conditions can be found at www.sesca.co.uk.

Disclaimer: No responsibility for loss occasioned to any person acting or refraining from acting as a result of any of the information in the material can be accepted by the speakers, SESCA Limited, Chartered Accountants South East (CASE), the South Eastern Society of Chartered Accountants Ltd and the Thames Valley Society of Chartered Accountants. The courses in this brochure are provided by CASE, the South Eastern Society of Chartered Accountants in partnership with SESCA Limited. We cannot be held responsible for any personal belongings left at any course venue.

Privacy: We take your privacy very seriously. Our privacy policy explains how we use any personal information we collect about you when you use our website or purchase a Flexiticket, course or conference place from us. For more information, please read our privacy policy statement available on our website at www.sesca.co.uk/privacy-policy.

TAXATION COURSES PROGRAMME

See also 'Specialist' section (pages 71-92) for specialist topics with taxation content

Course	Speaker(s)	Online/Area				Page
		Online	SE	SO	TV	
Taxation Update: Spring and Autumn	J.Mindell G.Mooney M.Ward	●	●	●		7
Taxation Update for Accountants in Business: Spring and Autumn	M.Ingles	●	●	●	●	8
A Practical Tax Brush Up for Returners	R.Benneyworth	●				9
Topical Tax Issues for Owner Managed Businesses	M.Ward	●				10
Complete Guide to Tax Planning for Small Businesses	M.Ward	●				11
PAYE and National Insurance Update	A.Durrant	●				12
A Practical Approach to Forms P11D	A.Durrant	●				13
Payroll Services for Clients: Practical Problems	A.Durrant	●				14
A Practical Introduction to Payroll	A.Durrant	●				15
IR35 – Where Are We Now?	T.Palmer	●				16
MTD for Income Tax – It's Here!	R.Benneyworth	●				17
Tax Planning in Difficult Economic Times	G.Mooney	●				18
Corporation Tax Update	G.Mooney	●				19
HMRC Investigations	J.Mindell	●				20
The Accountant on the Farm – A Comprehensive Review	D.Missen & G.Pilcher	●				21
Hot Topics in International Tax	J.Mindell	●				22
Impact of Brexit and the Subsequent EU - UK Agreements on Business and Taxation	J.Mindell	●				23
Essential Guide to Tax Issues on Buying, Selling and Closing Down Businesses	K.Read	●				24
Complete Guide to Tax and the Family	M.Ward	●				25
Tax Efficient Extraction of Funds from the Family Business	T.Palmer	●				26
Complete Guide to Acting for Small Businesses	M.Ingles	●				27
Pensions - What the Accountant Needs to Know	M.Ingles	●				28
Acting for Doctors Update	N.Stevenson	●				29
Capital Gains Tax and Inheritance Tax Refresher	M.Ward	●				30
IHT – Beyond the Basics	M.Ward	●				31
Capital Gains Tax for Owner Managed Businesses	M.Ward	●				32
Capital Taxes Update	M.Ward	●				33
Trusts: Update and Planning Using Client Case Studies	A.Fisher	●				34
Construction Industry Tax Refresher	T.Palmer	●				35
Dealing with Common Property Transactions	M.Ward	●				36
VAT Pitfalls and Solutions	D.Wootten	●				37
Hot Topics in VAT	N.Owen	●				38
Complete Guide to International VAT Issues	N.Owen	●				39
Complete Guide to Essential VAT for Charities	N.Owen	●				40
Complete Guide to VAT and Property Transactions	N.Owen	●				41
Complete Guide to VAT in the Construction Sector	N.Owen	●				42
Tales of the Unexpected: VAT Case Studies with Outcomes Good and Bad	N.Owen	●				43
Complete Guide to Partial Exemption and the Capital Goods Scheme	N.Owen	●				44
Topical Tax Tips and Pitfalls	G.Mooney		●			45

HALF YEARLY TAXATION UPDATES

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both.

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: Specific topics will be set nearer the time in order to ensure up to the minute coverage. Previous topics have included:

- Finance Act/Bill
- Topical tax administration and investigation points such as MTD and IR35
- Recent tax tribunal and court cases
- HMRC promulgations
- Developments in VAT
- Planning and practical points arising in the period

Speakers: (see table below)

Jeremy Mindell BA (Hons) CTA CIPD, lectures in tax; both domestic and international. He also lectures on pensions, share schemes and remuneration.

Giles Mooney BSc (Hons) FCA CTA, Managing Director of PTP Ltd, entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Mark Ward LLB is a very experienced lecturer. He has an ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style.

Dates, venues and timing:

Set out below are the dates and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). The timing for all courses is:

AM	Registration: 09:00	Course starts: 09:30	Break/Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Break/Coffee: 15:00	Course ends: 16:30

South East	Time	Speaker		
Wednesday 3 June	PM	MW	Mercure Maidstone, Great Danes Hotel	Code: JN03B6
Tuesday 1 December	AM	GM	Mercure Maidstone, Great Danes Hotel	Code: DE01A6
Southern	Time	Speaker		
Monday 29 June	AM	JM	Portsmouth Marriott Hotel	Code: JN29C6
Wednesday 25 November	PM	GM	Portsmouth Marriott Hotel	Code: NO25D6
Live Online	Time	Speaker		
Tuesday 12 May	AM	GM	Live online using Zoom	Code: MY12A6
Tuesday 12 May	PM	GM	Live online using Zoom	Code: MY12D6
Tuesday 9 June	AM	JM	Live online using Zoom	Code: JN09A6
Tuesday 9 June	PM	JM	Live online using Zoom	Code: JN09D6
Wednesday 17 June	AM	MW	Live online using Zoom	Code: JN17A6
Wednesday 17 June	PM	MW	Live online using Zoom	Code: JN17D6
Tuesday 10 November	AM	GM	Live online using Zoom	Code: NO10A6
Tuesday 10 November	PM	GM	Live online using Zoom	Code: NO10D6
Monday 23 November	AM	MW	Live online using Zoom	Code: NO23A6
Monday 23 November	PM	MW	Live online using Zoom	Code: NO23D6
Thursday 3 December	AM	MW	Live online using Zoom	Code: DE03A6
Thursday 3 December	PM	MW	Live online using Zoom	Code: DE03D6

HALF YEARLY TAXATION UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Martyn Ingles BSc FCA CTA

Objectives: All Chartered Accountants are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The emphasis is on recent developments in company and employee taxation as well as relevant VAT changes. Comprehensive notes are provided for future reference. The courses are run half yearly face-to-face, as well as being available live online.

Who should attend: Those working in industry and commerce who need to keep abreast of current tax developments.

Topics:

- Budget and Finance Act changes
- Current developments in company taxation
- Topical employee taxation issues
- Value Added Tax developments
- HMRC pronouncements
- Recent tax cases

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Dates, venues and timing: Set out below are the dates and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). There is a similar accounting update (see page 50 for details). The timing for all courses is as follows:

AM	Registration: 09:00	Course starts: 09:30	Break/Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Break/Coffee: 15:00	Course ends: 16:30

South East			
Wednesday 20 May	PM	Denbies Wine Estate, Dorking	Code: MY20B6
Tuesday 17 November	AM	Denbies Wine Estate, Dorking	Code: NO17A6
Southern			
Monday 29 June	PM	Portsmouth Marriott Hotel	Code: JN29B6
Wednesday 25 November	AM	Portsmouth Marriott Hotel	Code: NO25A6
Thames			
Monday 15 June	PM	Coppid Beech Hotel, Binfield, Bracknell	Code: JN15B6
Thursday 19 November	AM	Coppid Beech Hotel, Binfield, Bracknell	Code: NO19A6
Live Online			
Tuesday 19 May	PM	Live online using Zoom	Code: MY19B6
Friday 19 June	AM	Live online using Zoom	Code: JN19A6
Monday 16 November	AM	Live online using Zoom	Code: NO16A6
Friday 27 November	PM	Live online using Zoom	Code: NO27B6

A PRACTICAL TAX BRUSH-UP FOR RETURNERS

Speaker: Rebecca Benneyworth MBE BSc FCA

Objectives: This annual course is designed for accountants returning to the professional workplace after a career break, providing an overview of the current requirements of PAYE and NIC, VAT and business and corporation tax. This is not a detailed technical course. It will give the delegates the confidence required to say "I can do that" when returning to the workplace. The basic principles of the three topics will be covered, most of which will already have been learnt and understood by delegates, but which may not have been used for some time. The course will also cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, and "old stagers", who may be dealing with payroll, VAT returns and corporation tax computation work and who need to be brought up to date.

Topics:

- Update on tax rates & bands, NI rates and thresholds & minimum wage rates 2025/26
- A quick review of PAYE and NIC procedures for payroll; correcting errors; Statutory payments – where to find help
- An update on the tax treatment of common benefits and expense payments
- Incorporation considerations and extraction of profits
- Capital allowances update, loss relief
- MTD for income tax – the basics
- VAT, the registration and deregistration point, use of VAT schemes, the common pitfalls on reclaiming VAT

Speaker: Rebecca Benneyworth is well known on the lecture circuit for her practical and down to earth approach to tax issues. She is a past Chair of the ICAEW Tax Faculty. She currently lectures for a wide range of organisations, and has also presented sessions for HMRC and HM Treasury on a number of occasions. She sits on the Administrative Burdens Advisory Board which advises HMRC on tax compliance burdens on businesses. She has a small digital accountancy practice in Gloucestershire.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

* Please note: concessions on the standard fee for this course and the audit and accounting technical 'brush-up' (see page 51) are available for delegates not currently in work. For details phone 01737 223999.

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 21 May	PM	Live online using Zoom	CODE: MY21B6	
Wednesday 9 September	AM	Live online using Zoom	CODE: SE09A6	

TOPICAL TAX ISSUES FOR OWNER MANAGED BUSINESSES

Speaker: Mark Ward LLB

Objectives: What will the new Government choose to do with owner-managers and their businesses? This course aims to cover the practicalities of dealing with close companies in 2026 and beyond. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to close companies.

Topics:

- Tax efficient profit extraction in 2026 and beyond
- Tax breaks and incentives when working from home
- Using alphabet shares safely
- Dividend waivers
- Director loan accounts
- When to wind a company up and how
- Purchase of own shares
- Using EMI schemes
- Issues with the off-payrolling rules in the private sector
- Recent cases that will impact close companies

Topics are flexible and new areas may be added.

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Tuesday 28 April	PM	Live online using Zoom	CODE: AP28B6	
Tuesday 15 September	AM	Live online using Zoom	CODE: SE15A6	

COMPLETE GUIDE TO TAX PLANNING FOR SMALL BUSINESSES

Speaker: Mark Ward LLB

Objectives: This course aims to familiarise participants with the income tax, corporation tax, capital gains tax and inheritance tax matters that affect family businesses and their owners, and to make them aware of the tax planning opportunities that will enable their clients to minimise their current and potential tax liabilities.

Who should attend: Anyone advising SMEs on taxation.

Topics: As this course is designed to be topical specific topics may vary, however typically the course covers:

- Tax planning for sole traders and partnerships
- Extracting profits from the family company
- Anti-avoidance obstacles: IR35 and off-payroll working, settlements rules etc.
- Corporation tax mitigation
- Realising the value/passing on the family business - CGT and IHT implications

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical and understandable style, means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 26 February	PM	Live online using Zoom	CODE: FE26B6	
Wednesday 8 July	AM	Live online using Zoom	CODE: JY08A6	

PAYE AND NATIONAL INSURANCE UPDATE

Speaker: Alexandra Durrant FCA

Objectives: This course is designed to review the changes in the last year and those planned for the future in relation to PAYE and National Insurance legislation. It will also highlight some problem areas in payroll including employment status, taxation of benefits in kind and the changes to maternity, paternity and adoption provisions.

Who should attend:

- General practitioners and their staff
- General practitioners as employers
- Employees of companies with responsibility for payroll and related matters
- Returners to work needing an update on PAYE/NIC

Topics: Likely topics, but new topics to be added if relevant:

- Update on employment issues relevant to payroll
- PAYE update for 2026/27 tax year
- National insurance for 2026/27 tax year
- Employer NIC breaks to encourage employment
- National Minimum Wage update from 1 April 2026
- Automatic enrolment update and any current issues
- Update on HMRC mandatory payrolling of benefits from April 2027
- Update on maternity, paternity, adoption leave/pay provisions for 2026/27
- Review of recent HMRC consultation relating to payroll matters

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Wednesday 4 March	AM	Live online using Zoom	CODE: MA04A6	
Wednesday 18 March	PM	Live online using Zoom	CODE: MA18B6	

A PRACTICAL APPROACH TO FORMS P11D

Speaker: Alexandra Durrant FCA

Objectives: Your clients may think they can ignore P11Ds as they only pay “business expenses” – are you sure?

- To remind delegates of HMRC P11D reporting requirements, the filing deadlines and potential fines
- To highlight where and how reporting can be minimised thereby saving clients/businesses costs
- To clarify just which expenses must be reported
- To review the method of calculating the value for benefits in kind using either the “cash equivalent” or the special rules for the various benefits that employers may provide to employees for 2025/26 P11D returns

Who should attend:

- Practitioners: partners and staff who undertake P11D preparation for clients
- Accountants in business responsible for their company P11D forms

Topics:

- What is a P11D and why and when the form is required
- Voluntary payrolling of benefits – how does it work?
- Which expenses and benefits must be reported
- How to reduce reporting by use of:
 - Qualifying business expenses
 - Non-taxable payments and benefits
 - PAYE settlement agreements
- Practical guidance on calculating the taxable value of benefits in kind
- Update on mandatory payrolling on benefits from 6 April 2027

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online

Thursday 5 March	AM	Live online using Zoom	CODE: MA05A6
Tuesday 24 March	PM	Live online using Zoom	CODE: MA24B6
Friday 9 October	AM	Live online using Zoom	CODE: OC09A6

PAYROLL SERVICES FOR CLIENTS: PRACTICAL PROBLEMS

Speaker: Alexandra Durrant FCA

Objectives: Running payrolls for clients isn't simply entering data and pressing a button! Payroll staff need to understand the rules and their role and their responsibilities. This is a practical course designed to cover the issues that can arise when running payrolls for clients. It will highlight potential problem areas such as casuals, "self-employed," calculating holiday pay, maternity rights, terminations and benefits and expenses pitfalls.

Who should attend:

- Practitioners and staff overseeing or running payrolls for clients
- Practitioners as employers themselves
- Employees of businesses with responsibility for payrolls

Topics: These are flexible and new issues may be added, however likely content will be:

- Employers responsibilities – PAYE/NIC and Employment Law
- Importance of Contract of Employment
- Update on Employment Bill relating to payroll
- Dealing with casuals, zero hours workers and "self-employed"
- Holiday entitlement and calculation of holiday pay
- Termination of employment notice, final pay, redundancy and payroll input
- Pay and other rights for employees on family related leave
- Payrolling of benefits in kind - update
- Auto enrolment for pensions – payroll involvement
- Review of recent HMRC consultations on payroll matters

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 11 June	PM	Live online using Zoom	CODE: JN11B6	
Wednesday 16 September	AM	Live online using Zoom	CODE: SE16A6	

A PRACTICAL INTRODUCTION TO PAYROLL

Speaker: Alexandra Durrant FCA

Objectives: This course is designed to give attendees a good foundation in the payroll process. It will be invaluable for those working in payroll departments both in business and in practice. After listening there will be an opportunity to test new knowledge.

Who should attend: Anyone new to payroll wanting to gain knowledge and expertise. HR staff wanting to acquire a better understanding of the payroll process, payroll managers/staff who would like to enhance their understanding.

Topics:

- The payroll process
- Calculation of PAYE
- Tax Codes
- National Insurance letters/rates
- Calculation of National Insurance
- Statutory Pay
- Plenty of worked examples

Speaker: Alexandra Durrant is a chartered accountant and is a director of Aspiring Training Limited, based in Sussex. Previously she was a director of Alexandra Durrant Limited in East Grinstead providing audit, tax and accounting services to her clients, including payroll services and advice. Whilst a partner in a firm of chartered accountants in the City she was responsible for payroll operations, advising clients on PAYE and NI legislation and procedures and carrying out PAYE and NI health checks. She regularly writes and lectures on payroll matters for a number of training organisations, district societies and firms of chartered accountants and tax advisers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 1 October	Live online using Zoom	CODE: OC01A6

IR35 – WHERE ARE WE NOW?

Speaker: Tim Palmer CTA ATT

Objectives: This very practical course will provide delegates with a detailed review of the latest position regarding IR35 and consider the IR35 planning opportunities available.

Who should attend: The course will be suitable for delegates who advise clients on IR35, and who need a detailed refresher. Delegates in industry will also find it useful.

Topics:

- IR35 – where are we now?
- A practical IR35 update
- The latest developments regarding IR35
- Recent IR35 case law and the judges' decisions
- Corporation tax aspects and exemptions
- The IR35 calculations
- IR35 and employer's NIC
- The IR35 responsibilities for personal service companies
- IR35 and partnerships
- Planning how to avoid IR35
- IR35 and deemed employment
- IR35 and CIS
- Practical case studies
- General overview

Speaker: Tim Palmer is one of the UK's best known and popular tax presenters. He presents tax webinars and lectures frequently all over the UK on a wide variety of taxation subjects. He has been lecturing on tax matters for over 35 years now!

Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm. He was also a member of the tax department of P&O, the shipping and construction group, where he specialised in Corporation Tax and the Construction Industry.

Away from his lecturing, Tim provides tax consultancy advice on all areas of tax, including advising entrepreneurial businesses and their owners, and also high net worth individuals.

He provides tax advice to both accountancy practices and accountants in industry all over the UK.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 1 October	Live online using Zoom	CODE: OC01B6

MTD FOR INCOME TAX – IT’S HERE!

Speaker: Rebecca Benneyworth MBE BSc FCA

Objectives: To bring delegates fully up to date with any late changes to the MTD rules and any recent announcements affecting MTD for income tax. To demonstrate various filing options for a variety of client situations and give practical insight into the new rules based on Rebecca’s experience of filing under MTD since April 2024.

Who should attend: Everyone!

Topics:

- The basic requirements of the MTD for income tax regime
- Exemptions, exclusions and ‘soft landings’
- Recent announcements and late changes
- Demonstration of various filing options – full accounting software, bridging software
- Quarterly obligations and penalties for failure to meet them
- The final return – what and how. Software for filing year end. Penalties for late returns
- Client processes – record keeping, approval and other issues
- New late payment penalties

Speaker: Rebecca Benneyworth is well known on the lecture circuit for her practical and down to earth approach to tax issues. She is a past Chair of the ICAEW Tax Faculty. She currently lectures for a wide range of organisations, mainly to accountant audiences, but has also presented sessions for HMRC and HM Treasury on a number of occasions. She sits on the Administrative Burdens Advisory Board which advises HMRC on tax compliance burdens on businesses. She has a small digital accountancy practice in Gloucestershire.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 2 June	Live online using Zoom	CODE: JN02B6
Tuesday 16 June	Live online using Zoom	CODE: JN16B6

TAX PLANNING IN DIFFICULT ECONOMIC TIMES

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: With many businesses facing difficult choices and hard times ahead, this course will consider some simple tax planning ideas which advisers should consider for their self-employed and corporate clients.

Who should attend: Any tax professionals or accountants.

Topics: The course will cover:

- Business tax
- Tax issues around working from home
- Income tax considerations
- Losses
- Capital disposals to make ends meet
- Overdrawn loan accounts and excessive dividend payments

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Wednesday 29 April	PM	Live online using Zoom	CODE: AP29B6	
Tuesday 20 October	AM	Live online using Zoom	CODE: OC20A6	

CORPORATION TAX UPDATE

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: Recent Finance Acts have introduced a number of changes to the corporation tax regime, exempting some capital gains, allowing further relief for companies' expenditure and reintroducing marginal tax relief. Consultation continues on reform of corporation tax, whilst at the same time challenges are being brought in the courts. This course will bring participants up to speed on the familiar and not so familiar elements of corporation tax. It will enable any practitioner who deals with companies or their directors to discuss the current issues and point the way to resolving them.

Who should attend: Anyone advising SMEs on taxation.

Topics: Will be drawn from:

- Taxable profits
 - Interface between accounting principles and tax
 - Specific problem areas
 - Capital allowances
 - Transfer pricing
- The corporation tax charge
 - Rates of tax
- Loss reliefs
 - Identifying the options and using them efficiently
- Capital gains
 - Computation and reliefs
- Groups of companies
 - The substantial shareholding exemption
- Close companies
 - Loans to participators
 - Personal service companies – IR 35
- Administration of corporation tax
 - The CT 600 form
 - Payments of corporation tax
 - Self assessment and enquiries

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 22 April	Live online using Zoom	CODE: AP22A6
Thursday 8 October	Live online using Zoom	CODE: OC08A6

HMRC INVESTIGATIONS

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: To enable participants to deal more effectively with HMRC.

Who should attend: Any tax professionals or accountants who have dealings with HMRC.

Topics: HMRC is increasing investigations that it opens. It is also using its new powers and its information gathering capacity to target those investigations more effectively. It has also upped the penalties that it is looking to charge. 2025 has seen HMRC recover from its post Covid hiatus. It has increased the number of its investigations as it aims to reduce the tax gap. This course looks at how to engage with HMRC and includes the following topics:

- How HMRC chooses taxpayers to investigate
- Differentiating formal and informal investigations
- Time limits and Discovery Assessments – how long can HMRC go back?
- Dealing with the initial enquiry
- How to expedite the investigation process
- Taxpayers' rights and tactics
- Settling the investigation
- Mitigating penalties
- New powers for HMRC

The course will also cover agents' responsibilities in dealing with HMRC outside the investigatory framework. This is an area of increasing interest to both HMRC but also the bodies which regulate accountants and tax professionals.

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the "Big Four" accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

From 2013 Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis and gardening. He gives lectures on history which helps keep his presentation skills fresh.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 16 April	Live online using Zoom	CODE: AP16A6

THE ACCOUNTANT ON THE FARM – A COMPREHENSIVE REVIEW

**Speakers: David Missen BA FCA CTA
and Grant Pilcher FCA CTA TEP N Sch**

Objectives: The current government is now established and it is clear that their support for farming is putting new and extra strain on the industry which is having to adapt to address much reduced government monetary support and at the same time we are seeing continued volatile commodity prices and an accelerated move towards greening and net zero. As ever, weather conditions continue to dominate the day-to-day thoughts of our farming clients but how is the bigger picture developing? Will a cash-strapped government look for a greater contribution from landowners? What steps can be taken to protect the family farm? This intensive half day course will explore the challenges and issues faced by farming and rural communities and the solutions and opportunities available. It is aimed at keeping you up to date on what matters at what will be a key time for this specialist sector and focus on practical solutions based on real life situations.

Who should attend: Accountants already acting for this type of client, who have at least a basic knowledge of the subject, and are looking for a technical update and refresher would benefit most. It will also be suitable for those who would like an understanding of the specific problems encountered in the sector.

Topics: The topics covered will be set nearer the course date, but possible topics include -

- Current tax strategies, threats and opportunities
- The ongoing legislative programme and its impact on rural businesses
- Latest tax developments including Autumn Statement 2025 and Spring Statement 2026
- Harvest 2025 results and prospects for 2026
- Latest developments in SFI and why it is crucially important
- The state of UK Agriculture in 2026
- Cash management and capital funding requirements
- Farm economics and recent news from DEFRA
- Green developments - opportunities and tax consequences
- Inheritance tax and capital gains tax under the new regime
- Structures, successions, trusts, pensions and incorporation with illustrative case studies
- Capital Tax planning APR and BPR – what has changed or might change

Speakers: **David Missen** is an agriculture consultant at MHA. Having retired from Larking Gowen after thirty years of dealing with farming clients, he is now a farmer himself, and specialises in agriculture and rural accountancy issues. He is a founder member and past chairman of the ICAEW Farming and Rural Business Group, past editor of its newsletter, and co-author of the 2014 Wolters Kluwer publication *Agriculture: An industry Accounting and Auditing Guide*. David speaks regularly on rural and farming issues and brings real expertise to the course.

Grant Pilcher recently retired as head of agriculture for the East Anglian firm Larking Gowen, remaining as a consultant with them, having specialised in agricultural tax and accounting for over 30 years. Grant co-wrote *Agriculture: An industry accounting and auditing guide* with David Missen with whom he has lectured on this subject over many years. Grant was awarded a Nuffield Farming Scholarship in 2001 and has held many voluntary roles supporting agriculture in the eastern counties.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 6 May	Live online using Zoom	CODE: MY06A6

HOT TOPICS IN INTERNATIONAL TAX

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: To update participants on the issues that matter in International Tax.

Who should attend: Partners, senior managers, managers, and other staff who have clients with interests across national boundaries.

Topics: 2024 saw the consolidation of the BEPS Pillar 2 Project with a substantial number of countries implementing the 25% global minimum tax rate. 2025 sees the implementation of further moves by a number of countries including the subject to tax rule (STTR), and the backstop tax measures. The course will also look at President's Trump's tax measures and the changed stance in terms of Pillar 1 and 2.

We will look at how these measures affected international tax in 2024 as well as the ongoing roll out of the programme in 2025. There has also been further work on transfer pricing and new enforcement action as countries try to raise revenue without raising tax rates.

The course will include the following developments: -

- Transfer Pricing developments including HMRC's consultation on changes to the T/P rules
- The new minimum corporate tax rules
- Taxation of companies based on consumer infrastructure
- International investigations
- Hybrid developments
- Double Tax Treaty changes
- Permanent Establishment definitions
- Case law developments

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the "Big Four" accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

In 2013 Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis, and gardening. He gives lectures on history which helps keep his presentation skills fresh.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 17 March	Live online using Zoom	CODE: MA17B6

IMPACT OF BREXIT AND THE SUBSEQUENT EU - UK AGREEMENTS ON BUSINESS AND TAXATION

Speaker: Jeremy Mindell BA (Hons) CTA CIPD

Objectives: To update participants regarding post BREXIT agreements and developments.

Who should attend: Partners, senior managers, managers, and other staff who have clients with interests across national boundaries.

Topics: Since the United Kingdom left the European Union, it has concluded a number of agreements with the EU. These have covered trade as well as Social Security and taxation. The course covers how these changes have affected business and how to deal effectively with the opportunities and challenges that they create. These include:

- The UK / EU Trade and Cooperation Agreement
- The UK's agreement to the EEA Social Security Agreement
- Other post BREXIT agreements
- Trade agreements with countries outside the EU

Speaker: Jeremy Mindell entered the world of taxation after spending a couple of years in his family business. He started with Coopers & Lybrand and for the next 15 years was in three of the "Big Four" accountancy firms. He ended up as a Senior Manager with Deloitte & Touche, having worked issues such as profit-related pay, share schemes, expatriate tax, tax investigations, reward management, US taxation, transfer pricing and corporate tax. He was attracted by the opportunity to go in-house in 2001.

From 2013 Jeremy set up his own consultancy and lecturing business. Away from work, Jeremy likes cricket, history, skiing, tennis and gardening. He gives lectures on history which helps keep his presentation skills fresh.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online

Wednesday 11 March	Live online using Zoom	CODE: MA11A6
--------------------	------------------------	--------------

ESSENTIAL GUIDE TO TAX ISSUES ON BUYING, SELLING AND CLOSING DOWN BUSINESSES

Speaker: Kevin Read BSc ACA

A one-day seminar. It may be attended on the Flexiticket using 2 places or for a single fee of £185+VAT.

Objectives: There are a huge number of tax issues to consider, across a range of taxes, when dealing with business purchases and disposals. This course will look at transactions from both the purchaser's and vendor's perspective. It will also consider issues relating to the closing down of businesses.

Emphasis will be given to the unexpected tax charges that can catch the unwary, along with the reliefs available when deals are planned and structured tax-efficiently. Key compliance areas, such as warranties and obtaining HMRC 'clearance', will also be discussed.

To aid delegates' understanding, the course material will include numerous numerical examples.

Who should attend: This course will be of interest to anyone who deals with acquisitions and disposals of SME businesses and who wishes to gain a greater understanding of key personal and corporation tax issues that they may come across.

Topics:

- Disposal of company
 - Sale of assets or sale of shares?
 - Overview of key tax issues
- Business asset disposal relief
 - Problem areas with
 - Shares
 - Unincorporated trades
- Taking consideration as cash, shares or loan notes
- Deferred consideration and earn-outs
- Transactions in securities and other anti-avoidance legislation
 - Obtaining HMRC clearances
- Company and trade disposals – key corporation tax issues
- Compliance for purchaser
- Warranties and indemnities
- Hive-downs
- Demergers
 - The different types
 - Use in pre-sale planning
- Closing down companies
 - Comparison of strike-off and MVL
 - FA 2016 anti-avoidance on 'phoenixing' companies
- Employment-related securities (ERS)
 - Overview of impact on company disposals
- All relevant matters from recent Finance Acts will be covered

Speaker: Kevin Read qualified with PwC in 1988, spending his last 18 months there working in the corporate tax department. He worked as a tax tutor for BPP from 1989 until 1992, since when he has been a freelance tax lecturer and writer. This role involves delivering training courses, both in classrooms and online, as well as writing technical material for courses and publications. He has been a co-author, for over thirty years, of a Budget publication sold to small practitioners and writes regularly for *Tax Insider*.

Kevin specialises in update courses for accountants, private client managers and lawyers, covering a very broad range of tax topics. He is a regular presenter of webinars and classroom courses for major training firms, such as Tolley and Mercier. He also presents tax updates on a variety of subjects to local societies of the ICAEW and CIOT. He is known for bringing clarity to even the most complex of areas and for emphasising tax traps to avoid, as well as tips that may reduce your clients' tax bill.

Dates, venue and timing: Set out below are the dates and timings for the course. The fee for this course is £185+VAT (see page 4 for Flexiticket fees).

DAY	Waiting Room: 09:00	Course starts: 09:30	Lunch break: 12:30-13:30	Course ends: 16:30
------------	----------------------------	-----------------------------	---------------------------------	---------------------------

Live Online

Thursday 24 September	Live online using Zoom	CODE: SE24D6
------------------------------	-------------------------------	---------------------

COMPLETE GUIDE TO TAX AND THE FAMILY

Speaker: Mark Ward LLB

Objectives: This course is designed to give the delegate a refresher and update on family tax planning opportunities. It will cover a number of issues affecting individuals, their families and businesses. The course will explore the ways in which delegates can assist clients by ensuring their tax affairs are dealt with in the most tax efficient way.

Who should attend: All accountants in general practice who advise families on their tax affairs.

Topics:

- Children's income and gains
- Family provision - in a practical and tax efficient manner
- Spouse/civil partners tax planning
- Settlements legislation – avoiding being caught by the anti-avoidance legislation
- Residences - tax planning for the family home and other property
- Tax implications of Separation and Divorce
- Pensions
- The sale of a business and other exit planning for the business
- IHT mitigation for succession - including wills and trusts

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 7 May	PM	Live online using Zoom	CODE: MY07B6	
Thursday 5 November	AM	Live online using Zoom	CODE: NO05A6	

TAX EFFICIENT EXTRACTION OF FUNDS FROM THE FAMILY BUSINESS

Speaker: Tim Palmer CTA ATT

Objectives: This practical course will illustrate to delegates the tax and NIC efficient ways of extracting funds from the family business. The planning opportunities will be considered, together with succession, liquidation, and planning prior to sale.

Who should attend: The course will be useful for delegates who advise family businesses on the most tax and NIC efficient ways of extracting funds from the business, and forward planning to consider other areas such as succession, termination and sale.

Topics:

- Tax and NIC efficient extraction of funds from the family business
- Remuneration packages and benefits in kind
- Bonus v dividends
- The current dividend tax regime
- NIC mitigation and planning
- Passing surplus funds to family members
- Practical tax considerations for unincorporated businesses
- Forward tax planning including succession and possible sale
- Liquidation planning, and the impact of the TAAR
- Share schemes and their advantages
- The impact of recent case law on the extraction of funds
- The structure of the business
- Tax efficient reorganisations
- VAT considerations
- Company tax planning
- Practical case studies
- General overview

Speaker: Tim Palmer is one of the UK's best known and popular tax presenters. He presents tax webinars and lectures frequently all over the UK on a wide variety of taxation subjects. He has been lecturing on tax matters for over 35 years now!

Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm. He was also a member of the tax department of P&O, the shipping and construction group, where he specialised in Corporation Tax and the Construction Industry.

Away from his lecturing, Tim provides tax consultancy advice on all areas of tax, including advising entrepreneurial businesses and their owners, and also high net worth individuals.

He provides tax advice to both accountancy practices and accountants in industry all over the UK.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
-----------	----------------------------	-----------------------------	---------------------	---------------------------

Live Online		
Tuesday 10 March	Live online using Zoom	CODE: MA10A6
Wednesday 18 November	Live online using Zoom	CODE: NO18A6

COMPLETE GUIDE TO ACTING FOR SMALL BUSINESSES

Speaker: Martyn Ingles BSc FCA CTA

Objectives: This course aims to cover the practicalities of dealing with sole traders, contractors and personal service companies and will consider the lifecycle of the business from start up to sale. Planning issues will be discussed and supplemented by practical examples.

Who should attend: Anyone providing advice to sole traders, contractors with personal service companies and family businesses.

Topics:

- Employment status – am I really self-employed?
- IR35 and “off-payroll” working developments
- VAT issues for small businesses, including construction industry reverse charge
- MTD for income tax
- Bringing the spouse or partner into the business
- Is incorporation still tax efficient?
- Passing on and selling the business

Topical issues may be added nearer the time.

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 15 April	Live online using Zoom	CODE: AP15A6
Tuesday 22 September	Live online using Zoom	CODE: SE22A6

PENSIONS – WHAT THE ACCOUNTANT NEEDS TO KNOW

Speaker: Martyn Ingles BSc FCA CTA

Objectives: Saving for a pension is becoming increasingly important as State Pension age is scheduled to increase and is unlikely to provide sufficient to live on. Despite the changes in Finance (No.2) Act 2023 the system remains horrendously complex, but the rules present many opportunities. The course will look at the world of pensions to see how they impact upon clients especially in the area of retirement and estate planning. It is not a financial services course and will not be dealing with products from a financial services aspect.

Who should attend: Partners and staff who provide advice to private clients and family companies.

Topics:

- The ever changing pension limits – still important to know the chronology
- Don't overlook the State Pension – review missing years
- Individual and employer contributions
- The importance of "protection" in the light of the £268,275 limit
- Pension planning for family companies
- Tax charges if the limits are exceeded, including "scheme pays" election
- Planning advice
 - Third party contributions
 - Pensions as a part of estate planning, but watch new IHT rules from 6 April 2027
 - My business is my pension scheme – CGT BAD relief on sale

Speaker: Martyn Ingles qualified as a Chartered Accountant in 1982 and has specialised in taxation ever since. He became an Associate member of the Chartered Institute of Taxation in 1983 whilst working for a large international firm. His career has combined lecturing with tax consultancy, working for The Financial Training Company Ltd, Horwath Clark Whitehill, and more recently MacIntyre Hudson LLP.

Martyn's main area of interest is tax planning for the family business, in particular tax efficient remuneration, exit planning and restructuring. He lectures on this and other taxation issues as well as running his own tax consultancy practice.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Wednesday 25 March	AM	Live online using Zoom	CODE: MA25A6	
Tuesday 29 September	PM	Live online using Zoom	CODE: SE29B6	

ACTING FOR DOCTORS UPDATE

Speaker: Nick Stevenson FCA

Objectives: This course will provide an update on the accounting, taxation, and NHS pension matters that those dealing with GP Practice clients in England need to know about and understand.

Who should attend: Aimed at accountants who regularly deal with this sector looking for an update.

Topics: The content of the course is likely to include some but maybe not all of the following:

- GP Contracts
- PCNs
- Incorporation
- Integrated care systems
- Off-payroll working and IR35
- Making Tax Digital and basis period reform
- McCloud impact and the new HMRC portal
- Premises Costs Directions
- Pay Transparency
- Other “hot topics” relevant at the time of the course

Speaker: Nick Stevenson is a partner with MHA specialising in Primary Care. He has 30 years' experience working in the Healthcare sector and frequently lectures on this subject. He is responsible for a team dealing with over 100 GP practices and many other healthcare professionals.

Dates, venues and timing: Set out below are the dates and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 17 September	Live online using Zoom	CODE: SE17A6

CAPITAL GAINS TAX AND INHERITANCE TAX REFRESHER

Speaker: Mark Ward LLB

proposals will inevitably lead to significant changes in this area. The aim of the course is to update delegates on recent Capital Gains Tax and Inheritance Tax developments as they settle in and as we see how they work in practice including pitfalls and planning opportunities. The course will need to focus on the planning aspects which remain for our clients.

Who should attend: All partners and staff advising clients on tax planning and compliance.

Topics:

- Business asset disposal relief – pitfalls and planning
- The importance of “trading company” status
- Interaction with other CGT reliefs
- Private residence relief and other CGT changes around the house!
- Inheritance Tax refresher
- Business & Agricultural Property – 100% relief on the first £1m?
- What about pensions and IHT?
- Nil rate band planning – what should we advise?
- What’s left for the family home?
- Where are we going?

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for over 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 16 September	Live online using Zoom	CODE: SE16B6

IHT – BEYOND THE BASICS

Speaker: Mark Ward LLB

Objectives: So the Government has proved to have a completely different mindset regarding IHT, and the proposals current at the time of writing will inevitably lead to more taxpayers facing IHT consequences than previously. During this seminar a number of IHT planning opportunities available to individuals and trusts will be considered, along with the pitfalls to be avoided. The session will include an appraisal of the most recent changes in legislation and case law, as well as the protective steps that clients may need to take as and when we learn the Government's intentions.

Who should attend: Partners and staff in small and medium-sized practices.

Topics: These will reflect recent developments and changes, but are likely to include the following:

The essentials

- Understanding the interaction of CLTs and PETs
- Nil-rate band and residential nil-rate and – to transfer or not to transfer?
- Reminder of anti-avoidance rules

The family home

- Avoiding gifts with reservation of benefit
- Using pre-owned assets tax rules to reduce the IHT liability
- Dealing with the past and planning that may not have been effective

Business reliefs

- Planning for the future
- Digging deeper into the do's and don'ts of agricultural and business property reliefs
- Deathbed planning

Using trusts

- Getting to grips with exit and principal charges and the opportunities arising
- Advantages of nil-rate band trusts
- Immediate post-death interests
- Trusts for bereaved minors
- Discretionary will trusts and Deeds of Variation
- Flexible reversionary trusts

Other issues

- Family investment companies
- Investments generally

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for over 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical and understandable style, means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online

Tuesday 14 April	AM	Live online using Zoom	CODE: AP14A6
Wednesday 18 November	PM	Live online using Zoom	CODE: NO18B6

CAPITAL GAINS TAX FOR OWNER MANAGED BUSINESSES

Speaker: Mark Ward LLB

Objectives: To familiarise participants with the capital gains tax matters that affect owner managers and their businesses, and to make them aware of the interaction with other taxes and tax planning opportunities that will enable their clients to minimise their current and potential tax liabilities without falling foul of the various misguided beliefs and understandings that have grown over the years.

Who should attend: All partners and staff dealing with owner-managed businesses.

Topics: Will reflect topical issues, but will be drawn from:

- Business asset disposal relief
- Rollover relief
- Gifts relief
- Incorporation relief
- Substantial shareholdings exemption
- Structuring ownership of land and buildings
- Benefits of grouping for associated companies
- Targeted anti-avoidance rule on liquidations
- Planning for retirement and succession
- Planning for sale

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for over 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 12 March	PM	Live online using Zoom	CODE: MA12B6	
Thursday 12 November	AM	Live online using Zoom	CODE: NO12A6	

CAPITAL TAXES UPDATE

Speaker: Mark Ward LLB

Objectives: During this seminar a number of CGT and IHT planning opportunities available to individuals and trusts will be considered. The session will include an appraisal of the most recent changes in legislation and case law, as well as the protective steps that clients may need to take.

Who should attend: Partners and staff in small and medium-sized practices.

Topics: These will reflect recent developments and changes, but are likely to include the following:

CGT business reliefs

- Business asset disposal relief
- Gifts of business assets
- Incorporation v disincorporation
- CGT on the sale of a business
- Replacement of business assets
- Incorporation of property businesses

CGT personal reliefs

- Private residences
- Use of trusts

Inheritance tax

- Agricultural and business property reliefs
- Transferable nil rate band
- Will drafting/reviewing
- Deeds of variation
- Use of trusts

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 7 May	AM	Live online using Zoom	CODE: MY07A6	
Tuesday 6 October	PM	Live online using Zoom	CODE: OC06B6	

TRUSTS: UPDATE AND PLANNING USING CLIENT CASE STUDIES

Speaker: Amanda Fisher CTA ATT (Fellow) TEP

Objectives: This course has been developed not only to offer an update and a refresher for Trusts but to use five case studies to explore the use and reality of trusts for our clients.

The case studies will be based on actual client scenarios and the content will cover the creation of the trusts, the tax efficiency of the trusts and the management of the trusts and how to keep them tax efficient and relevant to the client needs.

Who should attend: General practitioners who already have trusts clients and would like to be more proactive in advising them on the tax efficient management of existing trusts. The course will also benefit practitioners who would like to increase their opportunities for advising clients on how to minimise their current and potential liabilities by using trusts.

Topics:

- Five client-based trust case studies
- The use and the relevance of the trusts
- The tax implications of creating the trusts
- Managing the trusts and minimising income tax, capital gains tax and inheritance tax
- Planning when to make income and capital distributions
- The formalities of ending a trust

Speaker: Amanda Fisher has her own tax and accountancy practice of private clients, alongside her other freelance work as a lecturer and author. She also regularly works as a consultant to firms and practitioners on an array of tax matters, specialising in capital taxes, trust and estate matters.

Amanda has devoted time as a committee member for STEP and ICAEW and is currently the Branch Chair for the Thames Valley branch of The Chartered Institute of Taxation.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Wednesday 29 April	AM	Live online using Zoom	CODE: AP29A6	
Thursday 17 September	PM	Live online using Zoom	CODE: SE17B6	

CONSTRUCTION INDUSTRY TAX REFRESHER

Speaker: Tim Palmer CTA ATT

Objectives: The aim of this course is to provide delegates with a detailed understanding of the current CIS tax rules and administration requirements. The CIS tax planning opportunities will also be considered.

Who should attend: All accountants in practice and industry and other professional advisers who are involved in the taxation aspects of the construction industry, particularly in tax dealings with contractors and subcontractors.

Topics:

- The CIS tax responsibilities of both the contractor and subcontractor under the current CIS regime
- The 2026 changes to the construction industry tax regime
- Are you trading in property?
- Verification and the steps contractors have to take
- The dealings the contractor will have with HMRC
- The monthly CIS return: its completion and filing
- The CIS tax impact on the subcontractor
- How to reclaim CIS deductions under the new regime
- Is the subcontractor really self-employed?
- The recent tax case law on CIS status
- Current problems facing contractors and sub-contractors
- What really are construction operations
- Who are within the scheme and who are not
- Case studies
- The interaction of IR35 with the construction industry
- Practical CIS planning
- General overview

Speaker: Tim Palmer is one of the UK's best known and popular tax presenters. He presents tax webinars and lectures frequently all over the UK on a wide variety of taxation subjects. He has been lecturing on tax matters for over 35 years now!

Previously, Tim was a senior Tax Manager with Howarth Clark Whitehill LLP, advising on all areas of tax and NIC for the firm. He was also a member of the tax department of P&O, the shipping and construction group, where he specialised in Corporation Tax and the Construction Industry.

Away from his lecturing, Tim provides tax consultancy advice on all areas of tax, including advising entrepreneurial businesses and their owners, and also high net worth individuals.

He provides tax advice to both accountancy practices and accountants in industry all over the UK.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 2 July	PM	Live online using Zoom	CODE: JY02B6	
Wednesday 4 November	AM	Live online using Zoom	CODE: NO04A6	

DEALING WITH COMMON PROPERTY TRANSACTIONS

Speaker: Mark Ward LLB

Objectives: The course will cover areas that practitioners encounter when dealing with clients with residential and commercial property interests.

Who should attend: The course is aimed at partners, managers and seniors who come across property related issues in their daily work.

Topics:

- Problem areas in the rental computation
- When to claim relief on furnishings
- Corporation tax issues under the new regime
- Structuring ownership of business premises
- Joint tenants or tenants in common?
- Allocating rental profits between property owners
- When to use declarations of trust and Form 17
- Furnished holiday lets
- Private residence relief
- CGT reporting
- Basic VAT issues
- Basic SDLT issues

Speaker: Mark Ward qualified with Arthur Andersen in 1989, having previously worked in the tax departments of a small and a medium-size firm. He has been lecturing on a wide variety of tax matters for 30 years to qualified practitioners and industry specialists in the UK and overseas. His ability to quickly establish a rapport with his audience, and discuss complex matters in a practical, and understandable style means Mark is much in demand on the lecturing circuit.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Wednesday 10 June	PM	Live online using Zoom	CODE: JN10B6	
Wednesday 14 October	AM	Live online using Zoom	CODE: OC14A6	

VAT PITFALLS AND SOLUTIONS

Speaker: Dean Wootten FCA CTA

Objectives: The course will cover VAT areas that practitioners and their staff encounter when dealing with owner managed clients.

Who should attend: The course is aimed at partners, managers and accounting staff who deal with owner managed clients in their daily work.

Topics:

- Registration issues – UK and overseas
- Common output tax liability errors
- When is Input tax not deductible?
- Business gifts – when we can and cannot recover VAT
- Barter transactions including influencers
- Dealing with international transactions
- Understanding transactions involving agents
- VAT issues when dealing with property
- Key aspects of partial exemption

Speaker: Dean Wootten has been involved in tax training for many years and lectures and consults on a wide variety of tax matters. Dean started his career as a Chartered Accountant, qualifying with Grant Thornton in 1988. Dean then spent two years overseas with KPMG before returning to a medium-sized provincial firm in Sussex. Shortly after returning to the UK, Dean qualified as an Associate of the Institute of Taxation in 1991. Whilst in practice Dean gained valuable experience including five years at partner level. The experience gained enables Dean to focus his lecturing on the practical aspects of the issues presented.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Tuesday 2 June	AM	Live online using Zoom		CODE: JN02A6
Thursday 12 November	PM	Live online using Zoom		CODE: NO12B6

HOT TOPICS IN VAT

Speaker: Neil Owen BA CTA (Fellow) FBIAC AIIT

Objectives: This course provides an update on important changes in VAT in the twelve months preceding the course. It will review recent cases and identify potential problem areas for clients. The course will explain in detail important or complex cases (including tribunal decisions) thus providing a better understanding of complex areas of VAT law.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics: The specific course content will depend on changes in the period before the course is run, but in general the course will follow the same structure covering:

- Any relevant Budget and Finance Act changes
- Identification of particular trends in cases or in the approach of HMRC
- Major VAT cases in the preceding twelve months: what the case established; likely impact on clients generally
- Topical tips and traps
- Important developments likely to occur in the succeeding months

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Objectives: This course provides an update on important changes in VAT in the twelve months preceding the course. It will review recent cases and identify potential problem areas for clients. The course will explain in detail important or complex cases (including tribunal decisions) thus providing a better understanding of complex areas of VAT law.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 26 February	AM	Live online using Zoom	CODE: FE26A6	
Tuesday 15 September	PM	Live online using Zoom	CODE: SE15B6	

COMPLETE GUIDE TO INTERNATIONAL VAT ISSUES

Speaker: Neil Owen BA FTII FBIAC AIIT

A one-day seminar. It may be attended on the Flexiticket using 2 places or for a single fee of £185+VAT.

Objectives: This course aims to provide participants with a thorough knowledge of the VAT provisions relating to international transactions, in both goods and services, and the problems often encountered in this area. It will also cover the implications of selling goods and services online.

By attending this course you will gain:

- A clear understanding of the way the rules work and how they are changing
- Greater confidence to advise clients undertaking international transactions
- An appreciation of some of the many pitfalls in this area and how to avoid them

Who should attend: All accountants involved in or advising on international transactions in goods and/or services.

Topics:

- Imports and exports
- Evidential requirements
- Complications with goods movement in the EU
- Supplying services to overseas customers
- When to charge VAT and when not to charge VAT
- Invoicing requirements
- Postponed accounting for import VAT
- Services bought from overseas suppliers
- The reverse charge
- Overseas VAT recovery
- Overseas registration issues
- EORI numbers
- Duty deferment
- Selling to EU consumers

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The fee for this course is £185+VAT (see page 4 for Flexiticket fees).

DAY	Waiting Room: 09:00	Course starts: 09:30	Lunch break: 12:30-13:30	Course ends: 16:30
-----	---------------------	----------------------	--------------------------	--------------------

Live Online		
Thursday 19 March	Live online using Zoom	CODE: MA19D6
Thursday 22 October	Live online using Zoom	CODE: OC22D6

COMPLETE GUIDE TO ESSENTIAL VAT FOR CHARITIES

Speaker: Neil Owen BA FTII FBIAC AIIT

Objectives: Ironically, charities have one of the most complicated VAT regimes of any business sector, meaning it is imperative that their finance teams and those advising them have a proper appreciation of the relevant VAT provisions. This course will review these provisions and their applications in depth, including some of the more problematic areas. By attending this course, you will gain:

- A thorough understanding of the VAT regime as it relates to the charitable sector
- A better awareness of those areas likely to cause the most problems and how best to deal with them
- A recognition of how to make the best of the complex VAT rules in this area

Who should attend: Anyone involved in auditing or advising charity sector clients. Finance directors and managers of charities requiring knowledge of the VAT regime applicable to their organisation.

Topics:

- Sponsorship
- Advertising
- Grants and donations
- Business/non-business
- Supplies to charities – standard rated, zero-rated and exempt supplies
- Supplies by charities – zero-rating and exemption
- Recovery of input by charities – problem areas

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online

Friday 8 May	Live online using Zoom	CODE: MY08A6
--------------	------------------------	--------------

COMPLETE GUIDE TO VAT AND PROPERTY TRANSACTIONS

Speaker: Neil Owen BA FTII FBIAC AIIT

Objectives: This course aims to provide participants with a thorough knowledge of the most topical aspects of this most complex area of VAT. It covers provisions relating to property developers and others owning an interest in property. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients undertaking property transactions
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in land transactions or property developments.

Topics:

- Sale and letting of new residential property
- Selling and leasing new property to charities
- Non-exempt property transactions
- The option to tax in detail
- Sale and purchase of let property

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 23 April	PM	Live online using Zoom	CODE: AP23B6	
Tuesday 13 October	AM	Live online using Zoom	CODE: OC13A6	

COMPLETE GUIDE TO VAT IN THE CONSTRUCTION SECTOR

Speaker: Neil Owen BA FTII FBIAC AIIT

Objectives: This course aims to provide participants with a thorough knowledge of the most topical aspects of this business sector. It covers the principal provisions relating to building contractors and others working in the construction industry. By attending this course, you will gain:

- A clear understanding of the way the rules work and why
- Greater confidence to advise clients providing or receiving construction services
- An appreciation of pitfalls in this area and how to avoid them

Who should attend: All accountants and other business advisers who have clients involved in the building sector including undertaking property projects.

Topics:

- Zero-rated new construction work in detail
- Reduced-rated building conversions in detail
- The exclusions from zero-rating and reduced-rating
- Work for charities and housing associations
- The construction sector reverse charge

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online			
Thursday 4 June	AM	Live online using Zoom	CODE: JN04A6
Thursday 5 November	PM	Live online using Zoom	CODE: NO05B6

TALES OF THE UNEXPECTED: VAT CASE STUDIES WITH OUTCOMES GOOD AND BAD

Speaker: Neil Owen BA FTII FBIAC AIIT

Objectives: This course covers a number of varied aspects of VAT where surprising or disconcerting outcomes can arise, some to the benefit of taxpayers, some where dangers lurk. Using case studies, it aims to draw attention to both the positive and the negative implications of the situations covered.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics: Areas covered will include:

- Registration and deregistration
- Disaggregation/business splitting
- Capital goods scheme (purchase and later disposal of a property)
- Let property TOGCs
- The disapplication of the option to tax – connected parties and exempt use
- Supplies of staff and the paymaster arrangements
- The reverse charge in “imported” services and its effect on exempt companies

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 24 March	Live online using Zoom	CODE: MA24A6

COMPLETE GUIDE TO PARTIAL EXEMPTION AND THE CAPITAL GOODS SCHEME

Speaker: Neil Owen BA FTII FBIAC AIIT

Objectives: This course aims to familiarise those attending with the full range of issues encountered in the area of partial exemption. Whilst the basic principle is relatively simple, the practical application in any given circumstance often requires an appreciation of the options available and potential opportunities and pitfalls that may exist. In addition, the capital goods scheme, which can extend the partial exemption provisions over ten years for some specific types of capital costs, merits close attention and an awareness of its dangers.

Who should attend: All practitioners who advise on VAT as well as accountants in business responsible for VAT.

Topics:

- The basic principle of partial exemption
- The de minimis limits
- The simplified de minimis test
- The standard method
- Special methods
- The process of attribution
- The importance of “wholly and exclusively”
- Identifying a capital item for the capital goods scheme (CGS)
- CGS initial claims
- CGS adjustments
- The CGS elephant trap

Speaker: Neil Owen is an independent consultant and speaker. He has specialised exclusively in VAT since 1984, when he joined HM Customs & Excise, which he left to become a consultant in 1990. He established his own practice, VAT Advisory Services Ltd, in 2007. A Fellow of the Chartered Institute of Taxation, Associate of the Institute of Indirect Tax and Fellow of the British Institute of Agricultural Consultants, he is currently National Deputy Chairman of the VAT Practitioners Group. Neil is an experienced and enthusiastic lecturer, with the unusual reputation for making VAT interesting.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 11 June	Live online using Zoom	CODE: JN11A6

TOPICAL TAX TIPS AND PITFALLS

Speaker: Giles Mooney BSc (Hons) FCA CTA

Objectives: This course will include a range of topical tax issues not covered elsewhere in the two and a half day SESCO Tax Conference at the University of Kent, Canterbury. It is offered as a stand-alone course at the conference. The sessions take place on the final day of the conference. If you prefer to attend the whole conference please see page 46. This course may be attended using one Flexiticket place or can be purchased on an individual course basis (see page 4 for fees). Please note the course starts at the slightly earlier time of 09:15.

Who should attend: General practitioners with small and medium-sized clients.

Topics: The topics covered will be set nearer the conference date. Giles will work closely with the other speakers to make sure that there is no significant overlap in content, although Giles' very practical slant on some topics covered on the conference may be useful to attendees.

Possible topics include:

- Making Tax Digital – key points summary
- Advice about incorporation or disincorporation for small businesses
- Extracting funds from your small limited company
- Off payroll working – a quick update

Speaker: Giles Mooney, Managing Director of PTP Ltd, is a Chartered Accountant and Chartered Tax Adviser and has been involved in UK tax training for many years. Giles entertains and educates professionals several days each week running tax seminars throughout the country. He is also the presenter of TAXtv and AccountingTV.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket and whole conference fee).

AM	Registration: 09:00	Course starts: 09:15	Coffee: 11:00	Course ends: 12:30
----	---------------------	----------------------	---------------	--------------------

South East		
Friday 26 June	University of Kent, Canterbury	CODE: JN26A6

ANNUAL RESIDENTIAL TAXATION CONFERENCE

24th – 26th June at the University of Kent, Canterbury

The SESCA Annual Residential Taxation Conference is designed to provide general practitioners with small and medium-sized clients a practical intensive update on taxation matters. Accountants in business may also find the content of relevance and professional interest. Although residential it may also be attended without staying overnight.

Overview: The latest developments in all the major taxes are covered in lectures presented by top speakers who are expert in their fields. The conference starts at 10:00 on Wednesday and closes at 13:30 on Friday.

The technical content is designed to be practical and of relevance to a wide audience from senior partners to newly qualifieds. Delegates receive comprehensive reference documentation on registration. The detailed timetable will be published in early 2026.

All accommodation is in single study bedrooms with ensuite facilities. This must be booked by delegates separately with the university.

The Friday morning topical tax tips sessions are offered as a stand-alone course for anyone not wishing to attend the whole conference, and the SESCA Flexiticket may be used to attend (see page 45). The session is presented by Giles Mooney. The course will cover a range of topical tax issues not covered elsewhere in the conference. For information on attending this separately phone 01737 223999 or visit www.sesca.co.uk/conferences.

Comment from 2025 attendee: "I think the residential course is excellent as it allows us to totally concentrate on the CPD without distractions."

The conference fee of £400+VAT includes all meals and refreshments but excludes accommodation. An early booking discount is available if you book and pay for your place before 30th April 2026.

Accommodation: The conference fee excludes accommodation which delegates must book individually with the university, a link will be available on www.sesca.co.uk in 2026.

SPEAKERS:

Martyn Ingles

Alexandra Durrant

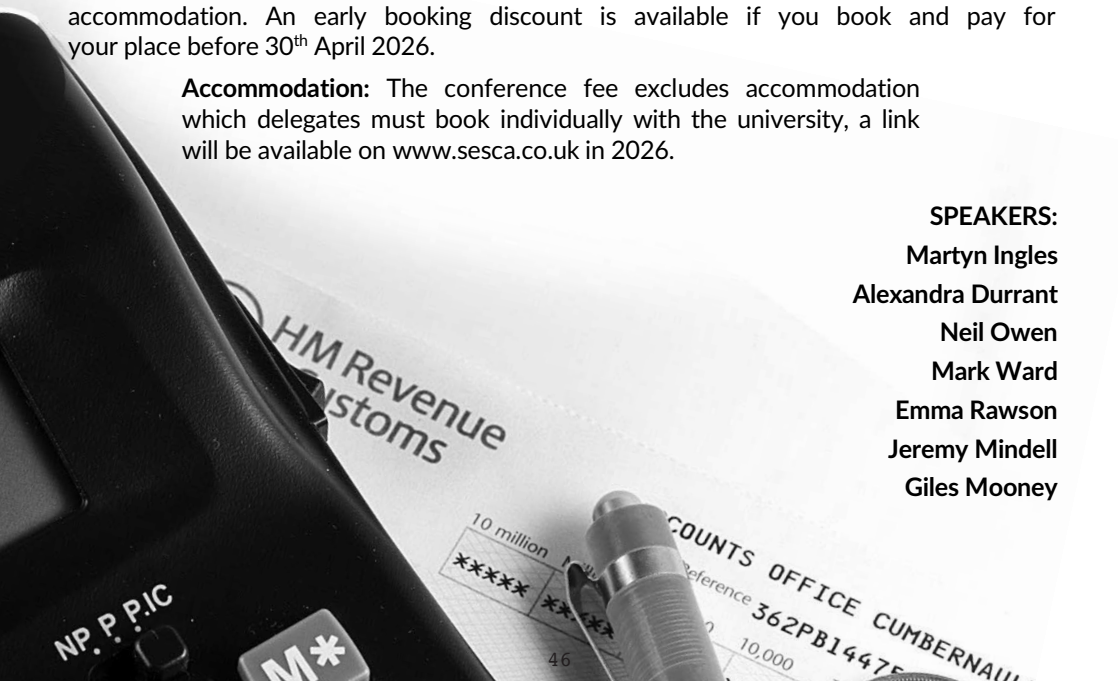
Neil Owen

Mark Ward

Emma Rawson

Jeremy Mindell

Giles Mooney



ACCOUNTING AND AUDIT COURSES PROGRAMME

See also 'Specialist' section (pages 71-92) for specialist audit and accounting topics

Course	Speaker	Online/Area				Page
		Online	SE	SO	TV	
Audit and Accounting Update: Spring and Autumn	G.Loveday	●	●	●		48
Accounting and Financial Reporting Update: Spring and Autumn	G.Loveday	●	●	●		49
Accounting Update for Accountants in Business: Spring and Autumn	G.Loveday	●	●	●	●	50
A Practical Accounting Brush Up for Returners	K.McCaffrey	●				51
Annual IFRS Update	G.Loveday	●				52
Effective Narrative Reporting	V.Steward	●				53
Problems Commonly Encountered Under IFRS and FRS 102 - and Solutions!	G.Loveday	●				54
Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	●				55
Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	●				56
Accounting for and Auditing Academy Schools Update	J.Charlton	●				57
SRA Accounts Rules Annual Update	J.Taylor	●				58
Companies Act Refresher	J.Selwood	●				59
LLP Refresher and Update	P.Herbert	●				60
GenAI in Audit and Assurance	P.Beard	●				61
Judgement and Scepticism – Improving the Audit Approach	R.Tiffin	●				62
Topical Audit Problems and Solutions	J.Selwood	●				63
Common Issues From Audit Cold File Review and How to Avoid Them	K.McCaffrey	●				64
Introduction to Root Cause Analysis	K.McCaffrey	●				65
Introduction to Charity Accounts	P.Herbert	●				66
Charity Audit and Independent Examination Update	P.Herbert	●				67
Introduction to Pension Scheme Accounts	M.Norbury	●				68
Pension Accounting, Audit and Regulatory Update	M.Norbury	●				69
Housing Associations Accounting and Audit Update	V. Steward	●				70

HALF YEARLY AUDIT AND ACCOUNTING UPDATES

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: These courses aim to provide busy practitioners and their staff with a practical and intensive review of developments over the last six months as well as changes likely to occur in the near future. Whilst the summer and winter courses are stand alone updates, maximum benefit is gained by attending both. Please note there are also accounting and financial reporting updates (for those who do not require audit) also presented by Guy Loveday on Tuesday 12 May, Tuesday 9 June, Wednesday 17 June, Tuesday 10 November, Monday 23 November and Thursday 3 December live online using Zoom, on Wednesday 3 June at Maidstone and Wednesday 25 November at Portsmouth (see page 49).

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: In order to ensure up to the minute coverage the detailed programme will be set nearer the time. Topics are likely to include:

- Practical implications of recent accounting and disclosure changes to FRS 105 and FRS 102, including Section 1A for small companies
- Other topical issues affecting owner managed businesses
- Implementation of the Economic Crime and Corporate Transparency Act 2023 including the plans to require all companies to file profit and loss accounts and the abolition of the abridged accounts option
- Other technical, regulatory and professional developments
- Application of new and revised Auditing Standards
- Important Audit Monitoring points including latest thoughts on the impact and effectiveness of root cause analysis

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing: Set out below are the dates, venues and timing for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Registration: 09:00	Course starts: 09:30	Break/Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Break/Coffee: 15:00	Course ends: 16:30

South East			
Tuesday 1 December	PM	Mercure Maidstone, Great Danes Hotel	Code: DE01B6
Southern			
Monday 29 June	PM	Portsmouth Marriott Hotel	Code: JN29D6
Live Online			
Tuesday 12 May	PM	Live online using Zoom	Code: MY12B6
Tuesday 9 June	AM	Live online using Zoom	Code: JN09C6
Wednesday 17 June	PM	Live online using Zoom	Code: JN17B6
Tuesday 10 November	PM	Live online using Zoom	Code: NO10B6
Monday 23 November	AM	Live online using Zoom	Code: NO23C6
Thursday 3 December	PM	Live online using Zoom	Code: DE03B6

ACCOUNTING AND FINANCIAL REPORTING UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: We provide this course for delegates who are looking for a technical update but do not require the auditing content. A half yearly taxation update is held on the same day (see page 7). The course provides a practical and intensive review of developments in accounting and financial reporting over the last six months as well as changes likely to occur in the near future.

Who should attend: Partners in small and medium-sized practices and their professional staff.

Topics: In order to ensure up to date coverage, the detailed programme will be set nearer the time. Topics are likely to include:

- Practical implications of recent accounting and disclosure changes to FRS 105 and FRS 102, including Section 1A for small companies
- Other topical issues affecting small and micro entity accounts
- Implementation of the Economic Crime and Corporate Transparency Act 2023 including the plans to require all companies to file profit and loss accounts and the abolition of the abridged accounts option
- Relevant technical releases and help sheets issued by professional bodies
- FRC staff fact sheets
- Other general areas of interest

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing: Set out below are the dates, venues and timings for these courses. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Registration: 09:00	Course starts: 09:30	Break/Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Break/Coffee: 15:00	Course ends: 16:30

South East			
Wednesday 3 June	AM	Mercure Maidstone, Great Danes Hotel	Code: JN03A6
Southern			
Wednesday 25 November	AM	Portsmouth Marriott Hotel	Code: NO25C6
Live Online			
Tuesday 12 May	AM	Live online using Zoom	Code: MY12C6
Tuesday 9 June	PM	Live online using Zoom	Code: JN09B6
Wednesday 17 June	AM	Live online using Zoom	Code: JN17C6
Tuesday 10 November	AM	Live online using Zoom	Code: NO10C6
Monday 23 November	PM	Live online using Zoom	Code: NO23B6
Thursday 3 December	AM	Live online using Zoom	Code: DE03C6

HALF YEARLY ACCOUNTING UPDATES FOR ACCOUNTANTS IN BUSINESS

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: All Chartered Accountants are required to undertake CPD. This course is specifically designed to meet the CPD needs of accountants working in business. The course will provide delegates with an update on accounting issues relevant to accountants working in industry and commerce. Comprehensive notes are provided which facilitate future reference. The courses are run half yearly and maximum benefit is obtained by attending both.

Who should attend: Those working in industry and commerce who need to keep abreast of accounting developments.

Topics: Specific course content will be finalised shortly before each course date, but topics will most likely include:

- The latest thoughts and interpretations on working with IFRS and FRS 102
Practical consequences of changes to FRS 102 – particularly relating to leases, revenue recognition and accounting policies
- Financial Reporting Council (FRC) annual and thematic reviews
- Progress towards the replacement of the FRC
- Practical examples of current issues
- Relevant technical releases from professional bodies

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venues and timing: Set out below are the dates, timing and venues for all the updates. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees). There is a similar taxation update (see page 8 for details). The timing for all courses is as follows:

AM	Registration: 09:00	Course starts: 09:30	Break/Coffee: 11:00	Course ends: 12:30
PM	Registration: 13:00	Course starts: 13:30	Break/Coffee: 15:00	Course ends: 16:30
South East				
Wednesday 20 May	AM	Denbies Wine Estate, Dorking	Code: MY20A6	
Tuesday 17 November	PM	Denbies Wine Estate, Dorking	Code: NO17B6	
Southern				
Monday 29 June	AM	Portsmouth Marriott Hotel	Code: JN29A6	
Wednesday 25 November	PM	Portsmouth Marriott Hotel	Code: NO25B6	
Thames				
Monday 15 June	AM	Coppid Beech Hotel, Binfield, Bracknell	Code: JN15A6	
Thursday 19 November	PM	Coppid Beech Hotel, Binfield, Bracknell	Code: NO19B6	
Live Online				
Tuesday 19 May	AM	Live online using Zoom	Code: MY19A6	
Friday 19 June	PM	Live online using Zoom	Code: JN19B6	
Monday 16 November	PM	Live online using Zoom	Code: NO16B6	
Friday 27 November	AM	Live online using Zoom	Code: NO27A6	

A PRACTICAL ACCOUNTING BRUSH UP FOR RETURNERS

Speaker: Kate McCaffrey BSc FCA

Objectives: This course complements the practical tax 'brush-up' course, providing an update for returners to the profession on audit, accounting, ethics and legislation. The basic principles of the topics will be covered, most of which will already have been learnt and understood by delegates, but which may not have been used for some time. The course will cover the more practical aspects of each subject area.

Who should attend: Returners to the professional workplace, who are qualified accountants and auditors that would like to "brush" up their knowledge and understand the changes that have taken place.

Topics:

- UK Accounting Standards Developments
- International Accounting Standards Developments
- Key Auditing Developments
- Corporate Governance
- Ethics
- Company Law update
- Relevant Legislation updates
- Current topics on the horizon

Speaker: Kate McCaffrey started her career as a graduate working at a Top 5 London based Audit firm. During her career Kate has worked on a large portfolio of audited entities ranging from small owner managed businesses to large, listed plc's across a wide number of sectors. As well as working on an audit portfolio Kate's career has developed into her pursuing her passion which is preparing and presenting training courses for trainees up to Partner level. Her many years of accumulated knowledge and experience ensures that the training provided is specific, practical, and relevant to the audience. Her style of training is described as energetic and motivational. Her previous roles have included being Technical and Training Partner of Chantrey Vellacott DFK as well as being a member of the ICAEW Assessment Committee.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

* **Please note: concessions on the standard fee for this course and the taxation technical 'brush-up' (see page 9) are available for delegates not currently in work. For details phone 01737 223999 or email courses@sesca.co.uk.**

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 21 May	AM	Live online using Zoom		CODE: MY21A6
Wednesday 9 September	PM	Live online using Zoom		CODE: SE09B6

ANNUAL IFRS UPDATE

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: This course will focus on the areas where UK companies and their auditors are being criticised for their failure to comply with IFRS. It will look at the ongoing impact of newly effective standards and changes in the pipeline.

Who should attend:

- Accountants responsible for preparing accounts under IFRS
- Accountants responsible for auditing accounts prepared under IFRS
- Accountants needing to convert from UK GAAP to IFRS

Topics: The course will cover:

- Developments in topical areas such as IFRS 16 on leases and IFRS 18 on presentation and disclosure
- Latest FRC Corporate Review concerning application of IFRS by UK companies
- Latest FRC Thematic Reviews
- Latest IASB developments including revisions to existing IFRS and IAS
- Relevant papers issued by the UK Endorsement Board

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Thursday 23 April	AM	Live online using Zoom	Code: AP23A6	
Wednesday 7 October	PM	Live online using Zoom	Code: OC07B6	

EFFECTIVE NARRATIVE REPORTING

Speaker: Valerie Steward BSc BFP FCA FCCA FRSA

Objectives: To consider the development of narrative reporting requirements in areas such as ESG (environment, social and governance) and to ensure that auditors and preparers of financial statements are aware of the importance of good quality narrative reporting in financial statements and the detailed requirements for different sizes and types of business.

Who should attend: Individuals who prepare or review financial statements.

Topics: Narrative reporting – who needs to disclose what – providing a detailed break down of what needs to be included in the financial statements for different types of business.

A detailed review of the requirements in:

- The directors report
- The strategic report
- Streamlined energy and carbon reporting
- The s172 statement
- Sustainability reporting
- Governance reports

Common pitfalls to avoid.

The auditors responsibilities.

Speaker: Valerie Steward has worked with accountancy practices, helping them to develop their businesses and remain compliant for over 30 years.

She is the author and co-author of a number of technical guides and work programmes on topics ranging from anti-money laundering to clubs and associations. Valerie enjoys helping firms to develop, advising on training and staffing policy and all aspects of practice management. She also lectures widely on auditing, management skills and assurance services.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 22 April	Live online using Zoom	CODE: AP22B6

PROBLEMS COMMONLY ENCOUNTERED UNDER IFRS AND FRS 102 - AND SOLUTIONS!

Speaker: Guy Loveday BSc (Econ) FCA

Objectives: This course will focus on the areas where UK companies and their auditors are being criticised for their failure to comply with IFRS or FRS 102, as appropriate.

Who should attend: Accountants who are responsible for preparing accounts under IFRS, FRS 101 or FRS 102 and accountants who are responsible for auditing accounts prepared under IFRS, FRS 101 or FRS 102.

Topics: The course content will be finalised shortly before the course is run but will most likely cover:

- Continuing problems involving the preparation and audit of cash flow statements
- Critical judgement and key estimation uncertainty disclosures – why do companies keep getting them wrong?
- Appropriate accounting policies and disclosures – recent guidance
- Missing accounting policies – how can it happen?
- Lease accounting under IFRS and FRS 102
- Guidance on other emerging problem areas including revenue recognition

Speaker: Guy Loveday is a partner in The Professional Training Partnership. He specialises in presenting auditing and financial reporting updates for accountants in practice and industry and finance courses for members of the wider financial community. He provides a consultancy service to assist companies in preparing their annual financial statements. He also makes occasional TV appearances.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 13 October	Live online using Zoom	CODE: OC13B6

ANTI-MONEY LAUNDERING AND FRAUD REFRESHER AND UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: Although the 2017 Money Laundering Regulations are well established now, they create a raft of practical problems for firms. This course will provide an insight into common issues that firms face when applying the regulations and how they should tackle these under the SARs regime.

Who should attend: Partners, managers and staff in accounting firms who want an update and refresher on AML compliance.

Topics:

- The 2017 Money Laundering Regulations – what they are and how they affect practitioners
- Recent updates to the CCAB guidance – practical implications
- Top tips on conducting efficient and effective client due diligence
- Different types of fraud that affect accountants and their clients and how to spot them
- Reporting money laundering offences to the NCA – key do's and don'ts
- Update on cybercrime and GDPR – what it is and what it means for firms and their clients in practice
- AML regulation - the future direction of travel

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online				
Monday 11 May	PM	Live online using Zoom	CODE: MY11B6	
Tuesday 3 November	AM	Live online using Zoom	CODE: NO03A6	

ACCOUNTING FOR DIRECTORS' AND RELATED PARTY LOANS AND TRANSACTIONS

Speaker: Peter Herbert BSc FCA

Objectives: Company law includes detailed disclosure requirements for credit transactions with directors, including loans, and guarantees on behalf of directors which apply to all categories of company. Accounting standards differ both in terms of the definitions of related parties and the requirements for disclosures.

These requirements are often misunderstood and misapplied. In this course we will provide practical guidance to ensure the correct disclosures are made, taking account that the directors will usually prefer minimal disclosures.

The course will also provide an overview of the taxation implications of the relevant loans and transactions.

Who should attend: Partners and staff involved in the preparation and audit of company accounts.

Topics: The course will cover the following:

- Company law requirements
 - What is an advance?
 - What is a guarantee?
 - What is disclosable and for whom?
- Who qualifies as a related party?
 - For large and medium-sized entities?
 - For small entities?
- What are the related party disclosure requirements?
- Directors and key management personnel remuneration
 - Disclosure requirements under company law
 - FRS 102 disclosures
- Controlling party disclosures
- Disclosures in group accounts
- Taxation implications of the above

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online			
Tuesday 3 March	AM	Live online using Zoom	CODE: MA03A6
Tuesday 22 September	PM	Live online using Zoom	CODE: SE22B6

ACCOUNTING FOR AND AUDITING ACADEMY SCHOOLS UPDATE

Speaker: James Charlton FCA

Objectives: This course will act as a refresher and an update on producing and auditing financial statements for Academy Schools. The latest Academies Accounts Direction and Academy Trust Handbook will be explored in depth.

Who should attend: General practitioners who prepare and audit financial statements for Academy Schools and finance officers working within the sector.

Topics: Topical financial reporting issues will be covered in detail, with real Academy financial statements used throughout as a point of reference. The audit part of the session will focus on balancing efficiency and effectiveness when conducting the true and fair and regularity audits required by the ESFA. Specific topics covered will be:

- The latest Academies Accounting Direction - key changes and their impact
- Subjective areas of accounting for Academies – and how to get them right
- 2025/26 Updates on the Academy Trust Handbook
- ESFA feedback for Academies and their auditors – examples of good and poor practice
- Academy accounts 'hot topics' – what they are and how to address them

Speaker: James Charlton is an experienced trainer specialising in financial reporting, auditing and charities. He worked in the audit technical team at a national mid-tier firm, providing financial reporting and audit technical advice to the audit and accountancy departments, before becoming an independent training consultant.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 16 June	Live online using Zoom	CODE: JN16A6

SRA ACCOUNTS RULES ANNUAL UPDATE

Speaker: Janet Taylor FCA

Objectives: Our annual update will provide delegates with a detailed review of the SRA Accounts Rules, any changes to the Rules in the last 12 months and a review of the most up to date guidance from the SRA relevant to the work and role of the Reporting Accountant.

Who should attend: All partners and staff who have a reasonable knowledge of the Rules and need to keep fully up to date with changes, be confident in recognising problem and riskier areas under these 'principles' based rules.

Topics: The session will cover:

- The rules themselves including:
 - Key definitions – including any changes
 - Dealing with receipts and payments and transferring money for the firm's charges
 - Problem areas: including the prohibition on banking facilities (including and updates to the SRA's Warning Notice and case studies) and how firms should be dealing with client balances
 - Operating a client's own bank account
 - All the guidance from the SRA
 - What can we learn for recent SRA regulatory settlement agreements and SDT rulings
- The role of the Reporting Accountant:
 - Terms of engagement and SRA expectations and any changes to the Reporting regime
 - The most up to date guidance from the ICAEW and the SRA regarding
 - Serious breaches/reportable issues – when to report?
 - Most common breaches reported
 - Potential impact of the SRAs Consumer Protection review on firms' holding client money

Speaker: Janet Taylor, owner Taylor Mowbray LLP, spent over 10 years with a top 20 accounting firm heading up their specialist solicitors' group. A highly experienced presenter, Janet provides relevant and practical training on a number of financial issues for lawyers. She is also a regular presenter of Solicitors' Accounts Rules training to a wide range of accounting and law firms through in-house and public seminars. Clients have included several major international and national law firms as well as reporting accountants. Janet is the current subject matter expert for the ICAEW's Solicitors Community Advisory Group, and co-author of the Law Society's *'Solicitors and the Accounts Rules Compliance handbook 4th Edition'*.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 18 March	Live online using Zoom	CODE: MA18A6

COMPANIES ACT REFRESHER

Speaker: John Selwood FCA

Objectives: The course is designed to keep accountants and auditors up to date with changes to the Companies Act 2006 and other relevant legislation.

Who should attend: The course is for all accountants involved in preparing and auditing company accounts and other aspects of company administration.

Topics: The Economic Crime and Corporate Transparency Act 2023 heralds some of the biggest changes ever for UK companies. Also, in recent years there have been significant changes to the Companies Act 2006 and there is more change to come. This course looks at the more recent changes that have taken place and the practical ways that accountants can help companies comply as well as looking at new proposals. In particular the course will cover:

- Changes at Companies House as part of Companies House reform
- Economic Crime and Corporate Transparency Act 2023 – details on implementation to date and upcoming changes
- Economic Crime Act 2022, as it impacts Companies House
- Changes to the form and content of the small and micro company regimes
- The register of persons with significant control (PSC registers)
- Confirmation statements
- Appointment of directors
- Changes to share capital
- Company communications
- Changes regarding company names
- The electronic filing of company accounts
- Practical problems applying the accounts form and content requirements
- The content of strategic reports and other narrative reporting requirements
- Tips to avoid accounts being rejected
- A refresher on other Companies Act issues and other topical areas

Speaker: John Selwood is an independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on auditing, financial reporting, company law and anti-money laundering.

Previously, he has been the technical partner for a top thirty firm of accountants and head of an accountancy network.

John is a member of ICAEW's Audit and Assurance Faculty's Technical and Practical Auditing Committee and has been involved with presenting and writing the material for the Audit & Assurance and Financial Reporting Faculty's events for many years.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
-----------	----------------------------	-----------------------------	---------------------	---------------------------

Live Online		
Tuesday 3 March	Live online using Zoom	CODE: MA03B6

LLP REFRESHER AND UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: This seminar provides an in-depth insight into the LLP SORP, from both an accounting and audit perspective. Practical examples are used throughout to deal with the issues accountants most often struggle with.

Who should attend: The seminar is targeted both at accountants who are new to accounting for and auditing LLPs and those who need a refresher and update.

Topics: The course will cover the following:

- The legal framework for LLPs
- Accounting for members' interests and remuneration
- LLP financial statements - key trips and traps
- Recent and future changes to the SORP and what they mean in practice
- Accounting for small and micro sized LLPs under FRS 102 Section 1A/FRS 105
- Common problem areas when auditing LLPs and how to resolve them

Please note that this course covers accounting but not taxation aspects.

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 12 March	Live online using Zoom	CODE: MA12A6

GEN AI IN AUDIT & ASSURANCE

Speaker: Peter Beard ACA BFP

Objectives: Generative AI (GenAI) presents a significant opportunity for the audit and assurance profession. To harness its potential, professionals must understand how to leverage these tools responsibly and effectively. This session aims to equip audit and assurance professionals with the practical skills to leverage GenAI for enhanced audit quality and efficiency, with a focus on responsible use aligned with professional standards.

You will learn how to use GenAI across the audit lifecycle, from planning and risk assessment to fieldwork and reporting. The course will cover how to use AI for analysing data, researching accounting standards, automating the drafting of workpapers, and creating clear client communications. You will also learn about the critical ethical principles, governance, and data security considerations required for much needed rapid, reliable, and responsible AI adoption.

The session will include practical, hands-on demonstrations of leading GenAI tools. Through guided exercises using sample data, you will build the confidence to apply these methodologies in your own work, ensuring a responsible, standards-aligned use of the technology.

Who should attend: Audit and assurance professionals seeking to upskill with a practical, hands-on workshop focused on quality, efficiency, and the responsible use of GenAI.

Topics:

- The Audit Lifecycle with GenAI: An end-to-end walk-through of where AI can streamline work.
- GenAI in Planning and Risk Assessment: Using AI to analyse data and research standards.
- GenAI in Fieldwork and Evidence Gathering: Automating documentation and identifying trends in data.
- GenAI in Reporting and Communication: Techniques for drafting clear, accurate, and compliant reports.
- Ethical Principles and Governance: A focus on data privacy, professional scepticism, and responsible use.
- Security and Data Considerations: Understand where your data goes and the security options available.

Speaker: Peter Beard is the Founder and Director of GenFinance.AI, a company focused on accelerating the worlds' finance professionals through rapid, reliable, and responsible GenAI adoption. A chartered accountant and former Auditor at EY, Peter has deep experience, including managing audits for FTSE and EURO Stoxx 50-listed companies, whilst contributing to EY's Global AI Research Team, and leading digital transformation projects at EY as a Technology Specialist. Recognised with EY UK awards for innovation and technical excellence, he now specialises in deploying GenAI for finance teams, and professional service practices.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Friday 15 May	Live online using Zoom	CODE: MY15A6
Thursday 15 October	Live online using Zoom	CODE: OC15A6

JUDGEMENT AND SCEPTICISM – IMPROVING THE AUDIT APPROACH

Speaker: Ralph Tiffin FCA

Objectives: To understand how regulation can improve our scepticism and judgement.

Auditors and accountants are sceptical by nature. We understand the cultures of and pressures on clients to take the most favourable (or unfavourable) view of subjective numbers. We challenge them, may disagree and in extreme cases will qualify the audit report.

Being professional today means following rules. Arriving at an opinion requires a clear record of our thinking. The FRC and professional bodies provide much support. However we have terms such as: “comply with regulatory guidance,” “mandatory guidance” and “The Practice Statement is a non-mandatory document. It does not change or introduce any requirements.”

Support is at hand as the FRC issued a press release and podcast on 19 March 2025 in relation to the Government’s request for all regulators to support growth in the UK. The podcast discusses the role of audit standards and how they can be applied in a proportionate and scalable way. The FRC will continue to promote the proportionate application of ISAs and support SMEs with further supporting material in the coming months.

The indicated Practice Note(s) are an important step in improving the quality of SME audits.

- To assist in understanding the application of the rules in auditing and other standards
- To be aware of what guidance exists and how to arrive at sound judgements

Content

- To review what being sceptical may mean.
- To understand where judgements are required specifically in audits of SME’s and less complex entities
- To understand the work required in making judgements – our clients’ and our own
- To consider if AI can improve effectiveness of our work

Who should attend: Auditors and accountants who audit, prepare and review financial statements, particularly statements with subjective numbers. Directors who are responsible for **their** numbers.

Topics: How sceptical should we be? That auditors are not sceptical enough is a continuing theme. Once we have tested clients’ and our judgments we have to “stand back” - we should review how critical or sceptical we (and our clients) have been.

The need for thoughtful and documented judgements

Subjectivity – where is judgement is required?

Many ISA’s and the underlying sections of FRS 102 cover potentially highly subjective amounts found in financial statements. Very obvious areas include:

- Valuations – “fair” values
- Provisions
- Impairments
- Revenue recognition

This session aims to focus on the recent FRC guidance on what **MUST** be done to ensure compliance with the requirements of the ISAs and contemporary practice.

How may AI help.

Speaker: Ralph Tiffin, a Chartered Accountant and Registered Auditor, has a degree in Mechanical Engineering, qualified as FCA with Coopers & Lybrand. Ralph is principal of his own chartered accountancy firm and registered auditors. The practice concentrates on audit work. Ralph provides consultancy for many companies in the UK and overseas on subjects ranging from project appraisal (particularly the rail sector), applying IFRS, through to ethics and fraud prevention. He is the author of a range of texts on accounting (*Executive Finance and Strategy – Kogan Page*) and project appraisal. He is a regular contributor to CPD courses.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
-----------	----------------------------	-----------------------------	---------------------	---------------------------

Live Online

Tuesday 29 September	Live online using Zoom	CODE: SE29A6
----------------------	------------------------	--------------

TOPICAL AUDIT PROBLEMS AND SOLUTIONS

Speaker: John Selwood FCA

Objectives: This course will look at real life problems that auditors have recently experienced and examine practical and efficient solutions.

Who should attend: All accountants involved in the audit of financial statements.

Topics: The course is a topical course and the content will reflect that. Topics might include:

- Auditor independence issues involving long association, provision of non-audit services, gifts and hospitality and fees
- Audit issues arising from recently revised ISAs including accounting estimates, risk assessment and fraud
- Audit planning issues
- Audit completion issues
- Companies Act requirements
- Audit Regulations
- Auditing groups
- Commonly reported problems in QAD and AQR monitoring reports
- Getting materiality right
- Relying upon experts and dealing with service organisations

Speaker: John Selwood is an independent training consultant, who lectures for major accountancy practices, professional bodies, training companies and publishers. He speaks on auditing, financial reporting, company law and anti-money laundering.

Previously, he has been the technical partner for a top thirty firm of accountants and head of an accountancy network.

John is a member of ICAEWs Audit and Assurance Faculty's Technical and Practical Auditing Committee and has been involved with presenting and writing the material for the Audit & Assurance and Financial Reporting Faculty's events for many years.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
-----------	----------------------------	-----------------------------	---------------------	---------------------------

Live Online		
Thursday 8 October	Live online using Zoom	CODE: OC08B6

COMMON ISSUES FROM AUDIT COLD FILE REVIEWS AND HOW TO AVOID THEM

Speaker: Kate McCaffrey BSc FCA

Objectives: To ensure that delegates prepare an audit file that is compliant with the ISA (UK) and the relevant legislation.

Who should attend: Anyone who is 2 years into their training contract or who is a qualified Auditor.

Topics: The course will give practical examples and utilise case studies to ensure that the delegates are aware of the common issues reported in cold file reviews in the following areas.

- The Strategic Report and Directors Report
- Other narrative reporting issues
- Ensuring that the audit report is tailored correctly
- The repeated common issues and problems with audit planning
- Reported deficiencies during the audit execution phase
- Audit Completion inadequacies
- Questions and Answers
- What next?

Speaker: Kate McCaffrey started her career as a graduate working at a Top 5 London based Audit firm. During her career Kate has worked on a large portfolio of audited entities ranging from small owner managed businesses to large, listed plc's across a wide number of sectors. As well as working on an audit portfolio Kate's career has developed into her pursuing her passion which is preparing and presenting training courses for trainees up to Partner level.

Her many years of accumulated knowledge and experience ensures that the training provided is specific, practical, and relevant to the audience. Her style of training is described as energetic and motivational.

Her previous roles have included being Technical and Training Partner of Chantrey Vellacott DFK as well as being a member of the ICAEW Assessment Committee.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 17 March	Live online using Zoom	CODE: MA17A6
Friday 20 November	Live online using Zoom	CODE: NO20A6

INTRODUCTION TO ROOT CAUSE ANALYSIS

Speaker: Kate McCaffrey BSc FCA

Objectives: The course will provide attendees with practical and theoretical knowledge of Root Cause Analysis (RCA). RCA should not be thought of as just a compliance exercise that has to be undertaken, it is a tool that can drive change and improve the quality of audit, financial statements and other assurance assignments.

Who should attend: Any professional staff who conduct audits, reviews financial statements or other assurance assignments. The course would also be useful for management of professional practice firms.

Topics:

- What is Root Cause Analysis (RCA)?
- Why is it important?
- How is RCA performed?
- Methods for performing RCA
- Who participates in the RCA?
- Your involvement
- When should RCA take place?
- What are the benefits of implementing RCA?
- Case studies and questions
- What next?

Speaker: Kate McCaffrey started her career as a graduate working at a Top 5 London based Audit firm. During her career Kate has worked on a large portfolio of audited entities ranging from small owner managed businesses to large, listed plc's across a wide number of sectors. As well as working on an audit portfolio Kate's career has developed into her pursuing her passion which is preparing and presenting training courses for trainees up to Partner level.

Her many years of accumulated knowledge and experience ensures that the training provided is specific, practical, and relevant to the audience. Her style of training is described as energetic and motivational.

Her previous roles have included being Technical and Training Partner of Chantrey Vellacott DFK as well as being a member of the ICAEW Assessment Committee.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Friday 18 September	Live online using Zoom	CODE: SE18A6

INTRODUCTION TO CHARITY ACCOUNTS

Speaker: Peter Herbert BSc FCA

Objectives: Charities are everywhere and are staple clients of many firms of accountants. This course will review the regulatory regime in which charities operate and provide the fundamentals needed for the preparation and scrutiny of charity accounts.

Who should attend: Partners and staff with little or no experience in charity reporting and those requiring a refresher of charity accounts fundamentals. The course will also benefit new charity treasurers and trustees.

Topics:

- Charities, charitable objectives and public benefit and the impact on the accounts
- What accounts are required and when do they need external scrutiny
- Charity funds and fund accounting
- Practical issues in the preparation of charity accounts
- The charity audit and report - an overview
- Independent examination – understanding the work and report
- Reporting to charity regulators

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Friday 6 March	Live online using Zoom	CODE: MA06A6

CHARITY AUDIT AND INDEPENDENT EXAMINATION UPDATE

Speaker: Peter Herbert BSc FCA

Objectives: Professional body inspectors are often critical of the way that charity audits are planned and performed - and Independent Examination work has also been a key area of focus in recent times. This seminar will navigate through all the practical challenges of performing and documenting these assignments in an effective but efficient way.

Who should attend: Accountants in professional firms who undertake audits and independent examinations of charities

Topics: The course will cover the following:

- When is an audit required – and when is a charity exempt?
- Key planning considerations
- Common problem areas – including income, revalued assets and investments
- How to complete the audit file and liaise with those charged with governance
- Documentation essentials - what makes a good charity audit file
- The Charity Commission directions for independent examinations step by step
- Documentation requirements for independent examinations – what professional bodies expect to see on file

Speaker: Peter Herbert is a chartered accountant. After qualifying in 1993 he spent a number of years in industry. He now spends much of his time delivering training courses on aspects on financial reporting, auditing, company law and practice regulation, principally to accountants working in professional practice and in industry. When not training, Peter spends his time carrying out audit file reviews and practice assurance reviews for firms of accountants and advising them on issues of financial reporting and audit methodology. This allows him to bring a practical insight to the courses and lectures that he delivers.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 28 April	Live online using Zoom	CODE: AP28A6

INTRODUCTION TO PENSION SCHEME ACCOUNTS

Speaker: Maya Norbury ACA

Objectives: The audit of pension schemes is one of the specialist areas which many firms are involved in and which is of special interest to the regulators. Many of the issues in pension scheme accounts are unique and not covered in more general accounting and auditing training.

This course will review the regulatory regime in which pension schemes operate and provide an understanding of the fundamentals needed for the preparation and audit of pension scheme accounts.

Who should attend: Partners and staff with little or no experience in pension scheme accounts and those requiring a refresher of pension scheme accounts fundamentals.

Topics:

- The pension scheme and how it works
- The types of pension scheme – defined benefit or money purchase and the impact on the accounts
- Understanding the function of The Pensions Regulator and other relevant laws and regulation
- Understanding the accounting and reporting requirements
- Understanding how to account for the transactions in the scheme
- Practical issues in audit and reporting

Speaker: Maya Norbury is a Chartered Accountant specialising in financial reporting and auditing with a particular interest in not-for-profit organisations and pension schemes. She worked in the audit department at an independent firm, supporting the audit department with training and technical updates, before becoming a training consultant. Maya is passionate about strengthening technical knowledge and improving audit quality.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 4 March	Live online using Zoom	CODE: MA04B6

PENSION ACCOUNTING, AUDIT AND REGULATORY UPDATE

Speaker: Maya Norbury ACA

Objectives: The pension scheme SORP continues to present challenges for accountants and auditors. This update will address all the common accounting and disclosure problem areas and how they should be tackled in practice, along with exploring the impact of the revision to the SORP.

The seminar will also reflect on the challenges faced by firms when auditing pension schemes and how they can successfully comply with the ISAs, whilst still maximising audit efficiency. In addition, we will update delegates on all recent regulatory changes and important pronouncements from the Pensions Regulator and the Pensions Research Accountants Group (PRAG).

Who should attend: Partners, managers and staff in accounting firms who prepare and audit pension scheme financial statements.

Topics:

- Which pension schemes do and don't need audited accounts
- The Pensions SORP 2025 – key changes and how these have been addressed
- Effective but efficient auditing of pension schemes
- Reliance on service organisations when auditing pension schemes – key tips and traps
- What QAD expect to see on a pension scheme audit file
- Reporting on contributions – what goes wrong and when to qualify the audit report
- The Pensions Regulator – impact of General (Single) Code of Practice and other topical issues

Speaker: Maya Norbury is a Chartered Accountant specialising in financial reporting and auditing with a particular interest in not-for-profit organisations and pension schemes. She worked in the audit department at an independent firm, supporting the audit department with training and technical updates, before becoming a training consultant. Maya is passionate about strengthening technical knowledge and improving audit quality.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Friday 13 March	Live online using Zoom	CODE: MA13A6

HOUSING ASSOCIATIONS ACCOUNTING AND AUDIT UPDATE

Speaker: Valerie Steward BSc BFP FCA FCCA FRSA

Objectives: FRS102 and the Social Housing SORP have been used by Registered Social Landlords across the UK since accounting periods beginning on or after 1 January 2015. This course will provide an update on practical challenges and emerging issues relevant to those working in or advising businesses in the sector. We will also provide an update on the revision to the SORP which, at the time of writing, is likely to be published in late 2025.

Who should attend: Accountants and other financial professionals within Housing Associations involved in statutory and management reporting and external accountants and auditors who act for clients in the Housing sector.

Topics:

- New accounting and disclosure developments relevant to housing associations
- Tricky accounting areas – and how to get them right
- Accounting and auditing challenges in housing groups and how to tackle them
- Other relevant regulatory changes – including recent changes from the Regulator of Social Housing - how these will impact on financial reports
- A file reviewer's perspective of common problems encountered when auditing housing associations
- How to prepare for the impact of the revised SORP

Speaker: Valerie Steward has worked with accountancy practices, helping them to develop their businesses and remain compliant for over 30 years.

She is the author and co-author of a number of technical guides and work programmes on topics ranging from anti-money laundering to clubs and associations. Valerie enjoys helping firms to develop, advising on training and staffing policy and all aspects of practice management. She also lectures widely on auditing, management skills and assurance services.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 6 May	Live online using Zoom	CODE: MY06B6

SPECIALIST COURSES PROGRAMME

Course	Speaker	Online	Page
Employment and Business Law Update	L.Dunford	●	72
Charities Update	J.Rowe	●	73
Charities Legal Update	C.D'cruz	●	74
Charity Trusteeship: Getting it Right for Finance Professionals	C.D'cruz	●	75
Ethics: Practising Professionalism	J.Williams	●	76
Ethics: Ethical Decision-Making for Accountants in Business or Practice Refresher	J.Williams	●	77
Essential Guide to Share and Business Valuations	D. Bowes	●	78
Generating More Fees from Advisory Services	M.Lee	●	79
Businesses in Trouble - Helping Your Client in Times of Crisis	P.Ridgway	●	80
Managing Change	T.Trevett	●	81
Managing Conflict and Confrontation	T.Trevett	●	82
Guarding the Ledger: Cyber Security and Data Protection	S.Hill	●	83
AI For Accountants: How The Finance Function Could Be Improved	S.Hill	●	84
The Art of Open Source Intelligence: Unlocking the Digital World	S.Hill	●	85
Why Power Query is the Most Important Excel Development Ever – Even if You Don't Work with Data!	S.Hurst	●	86
Good Spreadsheet Practice: Excel Fundamentals	S.Hurst	●	87
Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	●	88
50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	●	89
More Power to your Pivot: Practical Uses for Excel Pivot Tables	S.Hurst	●	90
Essential Word Productivity Skills and Techniques for Accountants	S.Hurst	●	91
New Employee Word & Excel Productivity Courses Bundle	S.Hurst	●	92

EMPLOYMENT AND BUSINESS LAW UPDATE

Speaker: Louise Dunford LLM LLB Barrister

topics likely to be most useful to you in your day-to-day dealings with clients and staff. There are a number of important changes to employment law which have been introduced by the government and more changes are planned. Broadly the course will attempt to cover the legal issues that accountants who assist SMEs are likely to deal with or be asked about in the course of their normal work and will round up all the important statutory changes and key case law from the previous 12 months, as well as what to expect in the next 12 months or so. The course is updated up to three weeks or so from the date it is presented, so the topics below are only a guide.

Who should attend: Employers and professionals providing advice to small companies and directors of SMEs.

Topics:

Employment Law

- Employment Status, including
 - Recent gig economy and IR35 cases
 - Members of LLPs
- Payroll developments
 - Minimum wage - recent cases
 - Working time – holidays and holiday pay
 - Reform of SSP and implications
- Family Friendly Reforms – what has happened and what is planned
- Unlawful discrimination – case law round-up and new developments, including recent developments around disability and mental health, gender status and neurodiversity along with age discrimination in a partnership
- Reform of unfair dismissal?

Company Law

- Directors' duties – new developments
- Personal liability for directors
- The new fraud offences
- Shareholder agreements, disputes and minority protection
- Share Purchase Agreements and recent case law
- Issues around succession in a small business and some new cases
- ECCTA 2023, Companies House reform and new offences

Other Business Law

- Selling a business
- Professional negligence round up

Speaker: Louise Dunford has been involved in training for accountancy professionals and for commercial companies for over 25 years, specialising in employment law, company law and professional negligence. She has been a consultant for many years for Complete HR Ltd, providing HR support to SME clients on all matters connected with recruitment and employment, including contract drafting, investigations, dismissals, tribunal and settlement work.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30

Live Online

Thursday 16 April	PM	Live online using Zoom	CODE: AP16B6
Wednesday 7 October	AM	Live online using Zoom	CODE: OC07A6

CHARITIES UPDATE

Speaker: Jayne Rowe

Attendance at this course together with 'Charities Legal Update' (page 74) is offered to registered charities at a combined concessionary fee of £110+VAT (half the standard fee).

Objectives: Charities continue to be affected by developments in accounting, tax, and external scrutiny is greater than ever both in terms of general public interest and interest by the regulator. There has been a lot of newly issued or updated guidance by the UK regulators as a result. This popular half-day course keeps you up to date with all the recent key developments.

Who should attend: Charity finance staff, charity auditors and examiners, advisors and charity trustees, especially treasurers.

Topics:

- Changes to the SORP, in accounting and annual reporting
- Charity regulator developments across the UK
- Revised guidance for auditors and examiners on their duties
- Overview of recent direct tax and VAT issues
- Charity cases of interest

Speaker: Jayne Rowe joined Crowe in January 2023 and is a Partner in their Social Purpose and Non-Profit Team. Jayne has more than 20 years' experience in the sector and has a breadth and depth of experience adding value to clients through due diligence work, advisory projects, governance and training advice and benchmarking services.

Jayne is a trustee of an overseas disability charity and was a member of the ICAEW Charity Committee. Jayne was also responsible for the establishment of the Charity Leaders Group in Cambridge, which provides a forum for charity Trustees and Senior Management to discuss key issues facing the sector.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 21 October	Live online using Zoom	CODE: OC21A6
Wednesday 11 November	Live online using Zoom	CODE: NO11A6

CHARITIES LEGAL UPDATE

Speaker: Claris D'cruz

Attendance at this course together with 'Charities Update' (page 73) is offered to registered charities at a combined concessionary fee of £110+VAT (half the standard fee).

Objectives: This course will provide an overview of the most important legal developments in the last 12 months for small and medium-sized charities. The course will cover current hot topics and areas of regulatory focus. We will also look at new key Charity Commission guidance and consultations, significant Commission investigation or compliance cases, and the main developments from the ICO and Fundraising Regulator. The course will also cover any major new Charity Tribunal or court cases relevant to charities that have been reported up to two weeks prior to the course.

Who should attend: Charities staff, trustees and their advisors.

Topics:

- **Introduction**
 - Current landscape for regulated charities
 - What is a charity?
 - Different charity structures
 - Legal implications of the different legal structures
- **Key Issues for Charity Trustees**
 - Six main governance duties
 - Core duties under the Charities Acts
 - Handling and reporting serious incidents
 - Safeguarding and protecting people
 - Risks and sector trends
 - Other topical issues
- **The Charities Act 2022**
 - Update on implementation
 - How are provisions working in practice?
- **Legal Developments**
 - Case law update
 - Charity Tribunal cases
- **Charity Commission**
 - Overview for 2025-2026
 - Significant status cases
 - Regulatory trends
 - Guidance and alerts – what's new?
 - Consultations
 - Engagement with charity trustees
- **The latest from other regulators**
 - The ICO
 - The Fundraising Regulator
- **On the Horizon**
 - Current challenges facing the sector
 - What to watch out for

Speaker: Claris D'cruz qualified as a barrister in 1994 and left the Bar to become a charity lawyer. She has over 25 years' experience as a governance lawyer advising charities, of all sizes, nationwide on a wide range of governance matters. She worked as an in-house legal adviser for a registered charity then as a Charity Commission lawyer, before going into private practice. She was head of charities at a major NE law firm, before becoming a charity consultant. She has over 12 years' experience on a range of charity and not-for-profit boards. Claris also has over 25 years' experience of providing training for trustees and senior charity executives, as well as CPD training for lawyers and other professionals on charity law and governance issues.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
-----------	----------------------------	-----------------------------	---------------------	---------------------------

Live Online		
Wednesday 21 October	Live online using Zoom	CODE: OC21B6
Wednesday 11 November	Live online using Zoom	CODE: NO11B6

CHARITY TRUSTEESHIP: GETTING IT RIGHT FOR FINANCE PROFESSIONALS

Speaker: Claris D’cruz

Objectives: Being a charity trustee is richly rewarding and can help professionals become well-rounded advisors. However, Kids Company and other recent cases have highlighted the risks professionals face, when things go wrong. In this session Claris D’cruz, a specialist charity lawyer with significant charity board experience, will explain the core duties and responsibilities of a charity trustee, the additional responsibilities that a professional may have and the steps that they can take to protect themselves.

Who should attend: Accountants, auditors and finance professionals who are charity trustees, as well as charity staff who support them.

Topics:

- The role of charity trustees
- Duties that underpin good governance
 - The six main duties
 - Duties under the Charities Act
- The higher-level duty for a finance professional
- What to do when things go wrong
- Consequences of failing to discharge your duties
 - Potential liability
 - Professional implications
- Lessons to be learned from recent cases
- Practical tips on how to carry out the role properly
- Steps you can take to protect yourself

Speaker: Claris D’cruz qualified as a barrister in 1994 and left the Bar to become a charity lawyer. She has over 25 years’ experience as a governance lawyer advising charities, of all sizes, nationwide on a wide range of governance matters. She worked as an in-house legal adviser for a registered charity then as a Charity Commission lawyer, before going into private practice. She was head of charities at a major NE law firm, before becoming a charity consultant. She has over 12 years’ experience on a range of charity and not-for-profit boards. Claris also has over 25 years’ experience of providing training for trustees and senior charity executives, as well as CPD training for lawyers and other professionals on charity law and governance issues.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 10 June	Live online using Zoom	CODE: JN10A6

ETHICS: PRACTISING PROFESSIONALISM

Speaker: Jez Williams FCA

This course is available on the Flexiticket when combined with the Ethics: Ethical Decision-Making for Accountants in Business or Practice Refresher course. Together both courses use one place on any Flexiticket. Please see page 77 for more information on the Ethics: Ethical Decision-Making for Accountants in Business or Practice Refresher course. If not booked as part of the Ethics courses bundle on a Flexiticket, the individual course fee is £33+VAT.

Objectives: This course will assist delegates in understanding the ethical frameworks and rules for accountants and especially for audit engagements, including practical examples of ethical threats and safeguards.

Who should attend: The session is relevant to all accountants and is a mandatory annual element of the ICAEW's CPD requirements.

Topics:

- Professional ethics and the public interest duty
- Sources of rules, including the ICAEW Code of Ethics 2025 (including a summary of recent changes), the ACCA Code of Ethics and Conduct and the FRC Ethical Standard
- The fundamental principles
- Common professional ethics issues when dealing with clients or acting as an employee:
 - Acceptance of (re)appointment – what to consider
 - Relationship threats and how to respond
 - Familiarity and intimidation
 - Other areas of conflict

The course topics have been mapped to the learning outcomes stipulated by the ICAEW. More information is available on the Ethics: Practising Professionalism course page on our website www.sesca.co.uk.

Speaker: Jez Williams, is a chartered accountant who qualified with KPMG before joining the training sector in 2000. Jez is a well-known speaker in the UK accounting circuit and a member of the ICAEW Audit and Assurance Faculty Board from 2017 to 2023. He regularly presents for ICAEW and for other established training providers in the UK.

Fee: The fee for this course is £33+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with 1 year's access	1 hour recorded online course accessed via the SESCA website	CODE: ET01A6

ETHICS: ETHICAL DECISION-MAKING FOR ACCOUNTANTS IN BUSINESS OR PRACTICE REFRESHER

Speaker: Jez Williams FCA

The Business or Practice version of this course is available on any Flexiticket when combined with the Ethics: Practising Professionalism course. Together the Ethics: Ethical Decision-Making for Accountants in Business or Practice Refresher and Ethics: Practising Professionalism courses use one place on any Flexiticket. Please see page 76 for more information on the Ethics: Practising Professionalism course. If not booked as part of the Ethics courses bundle on a Flexiticket, the individual course fee is £43+VAT.

Objectives: This two-hour recorded online refresher course will assist delegates in ethical decision-making. It includes a reminder of the fundamental principles and the 'threats and safeguards' model as well as five case studies. There is a practice version for accountants in practice, and a business version for accountants in business.

Who should attend: All accountants.

Topics:

For accountants in business

- The fundamental principles and the 'threats and safeguards' model
- Ethical decisions: case studies (relevant to accountants in business)

For accountants in practice

- The fundamental principles and the 'threats and safeguards' model
- Ethical decisions: case studies (relevant to accountants in practice)

The course topics have been mapped to the learning outcomes stipulated by the ICAEW. More information is available on the Ethics: Ethical Decision-Making for Accountants in Business or Practice Refresher course page on our website www.sesca.co.uk.

Please note, the two-hour duration is the expected time taken to complete the course as it includes time to read and reflect on each case study before continuing with the recording.

Speaker: Jez Williams, is a chartered accountant who qualified with KPMG before joining the training sector in 2000. Jez is a well-known speaker in the UK accounting circuit and a member of the ICAEW Audit and Assurance Faculty Board from 2017 to 2023. He regularly presents for ICAEW and for other established training providers in the UK.

Fee: The fee for this course is £43+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Business version: Available anytime with 1 year's access	2 hours recorded online course accessed via the SESCO website	CODE: ET02A6
Practice version: Available anytime with 1 year's access	2 hours recorded online course accessed via the SESCO website	CODE: ET03A6

ESSENTIAL GUIDE TO SHARE AND BUSINESS VALUATIONS

Speaker: David Bowes FTII FRICS EWI

Objectives: Many accountants carry out valuations of shares and businesses only infrequently, and many more would like to be able to add valuation to their portfolio of services. This course covers all the basic valuation concepts and principles, concentrating on the smaller entities that comprise the overwhelming majority of businesses in the UK. Therefore, both for beginners or occasional valuers who feel that they might benefit from an update or refresher, this half day session is highly recommended.

Who should attend: Partners, managers and staff who may become involved with share and business valuation issues, whether in practice or in industry, and for all purposes, including shareholder disputes, tax including employee share awards, incorporation, divorce, trustee transactions and other sales and purchases of shares and businesses.

Topics: It will highlight those all important negotiations with SAV, including valuations of shares for EMI options and goodwill on incorporation. However, it also deals with the many valuation principles likely to be of application in non-tax situations, and discusses the crucial issue of discounts.

The topics to be covered will include:

- Valuations of smaller companies and unincorporated businesses
- Different types of shares
- Accounts' analysis
- Valuation methods – earnings, assets, dividend yield, industry customs
- Comparability
- Market value
- Tax valuations and negotiating with SAV
- Adjustments to profits
- Information for valuation purposes
- Goodwill

Speaker: David Bowes, joined the Bruce Sutherland partnership in 2009, having been Head of Valuations at a top fifteen Accountancy firm and, before that, a major Tax Consultancy. He was previously a senior member of Shares Valuation Division, (now Shares and Assets Valuation) of HM Revenue and Customs. He is an experienced lecturer on valuation and writes articles on the subject for the professional press. He has appeared as an expert witness in Court and the Tax Tribunal. He is a former Honorary Secretary of the Society of Share & Business Valuers, and the author of Tolley's Practical Share and Business Valuation.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room 09:00	Course start 09:30	Break 11:00	Course ends 12:30
----	--------------------	--------------------	-------------	-------------------

Live Online		
Tuesday 21 April	Live online using Zoom	Code: AP21A6
Tuesday 6 October	Live online using Zoom	Code: OC06A6

GENERATING MORE FEES FROM ADVISORY SERVICES

Speaker: Mark Lee FCA

Objectives: This session will reveal how accountants have always provided advisory services to some degree, how you can provide more (to most clients) and how you can secure decent fees for doing so. In so doing we will also debunk the hype around advisory services and explain the breadth of ways in which you might choose to promote and deliver advisory work.

Compliance work is not dying but AI and tech are enabling accountants to prepare accounts and tax returns faster than ever.

Sooner or later this will make it harder to win the new clients you want, whether to expand or to replace those that retire, sell out or pass on. So this course will help you understand the full breadth of advisory services you could be promoting and providing to clients, where to start, how to get paid for 'advisory' and how to win new clients for anything beyond compliance work.

Who should attend: Sole practitioners, managers and partners responsible for growing the profitability of their practice.

Topics: At the end of this course, you will:

- Appreciate why you will need to do things differently in the future
- Understand which of the five types of advisory services you can provide
- Be more confident in your ability to provide a wider range of services to your clients
- Be aware of a range of tech related facilities that will enable you to deliver valuable advice
- Know how other accountants like you have made the transition
- Know how to secure new business at a fair fee
- Be keen to provide advisory services to clients and to charge appropriately

In short, you will become a more effective and attractive accountant able and confident in providing clients with advice on business finances and so much more than recurring compliance work.

Speaker: Mark Lee loves sharing strategic insights and advice with accountants and tax advisers who want more leads, more referrals and to stand out from the competition. He is passionate about helping individual accountants to achieve more success in their careers and practices.

He originally qualified as a chartered accountant and later a tax adviser, working in practice until 2006. He worked for all sizes of firm including BDO in London who headhunted him from a smaller practice.

In more recent years Mark has written and spoken for hundreds of firms and thousands of accountants. His blogposts, LinkedIn posts and online articles have been viewed well over a million times. His talks and advice avoid fluff, hype and waffle. Rather they are always focused on what is practical and commercial.

Mark is a proud Fellow of the ICAEW, The CIOT and the Professional Speaking Association.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Wednesday 14 October	Live online using Zoom	CODE: OC14B6

BUSINESSES IN TROUBLE – HELPING YOUR CLIENT IN TIMES OF CRISIS

Speaker: Philip Ridgway CTA (Fellow) FABRP Barrister

Objectives: Even in good times, businesses can run into trouble. Overexpansion, higher interest rates, increased costs, competitive pressures or just bad luck can result in some previously successful businesses finding themselves in financial difficulty. One of the options available to them is to re-structure to improve performance and financial efficiency, and, ultimately, survive. This talk highlights the various courses of action open to struggling businesses together with their tax implications and some defensive measures that can be taken before trouble hits.

Who should attend: Any tax adviser concerned that some of their clients may struggle financially.

Topics:

- The tax implications of ring-fencing a financially burdensome business, company or division (CT/CGT, VAT/TOGC, SDLT), covering share/asset disposals, demergers and hive-downs within groups.
- The tax implications of restructuring a company's debt (mainly loan relationship rules), covering the rescheduling/release of debt and debt for equity swaps.
- The tax implications of insolvency proceedings (mainly corporation tax, group relief etc, but also CGT/ negligible value claims for shareholders).

Speaker: Philip Ridgway joined Temple Tax Chambers when he returned to the Bar in June 2007. He lectures and advises on all areas of revenue law both corporate and personal but has a particular interest in corporate tax matters including acquisitions and disposals, reconstructions and demergers, MBO's, returning capital to shareholders, s425 schemes, Stamp Duty, SDLT and SDRT.

Philip has a special expertise in the taxation of insolvent companies, members' voluntary liquidations (including s110 schemes) capital reduction demergers and bankruptcy taxation.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 26 March	Live online using Zoom	CODE: MA26A6

MANAGING CHANGE

Speaker: Toni Trevett FCIPD

Objectives: Change is an inevitable part of organisational life, at some point you will be called upon to help lead it and/or participate in it. But often there is fear of change and this can lead to resistance.

Change and managing change can take you outside of your comfort zone. But change is predictable. You can anticipate how people will respond, and what you need to do to engage them positively. You can plan, prepare, and handle the process as well as the resistance that will often come. To do that, you need a practical approach, change management skills, tools and models, and this course will give you them.

Who should attend: Everyone!

Topics:

- Understanding the change management cycle (from planning and change impact assessments to execution...from monitoring to embedding)
- Remembering that change is about people
- The Kubler-Ross change curve
- Lewin and Kotter's change management model
- The need for change. How to paint a compelling picture of the future
- The role and importance of Leadership in change
- Common barriers to change
- Handle resistance to change effectively. How to win over the doubters and resisters
- Plan for effective and influencing communications
- Feedback loops and continuous improvement
- Sustaining change

Speaker: Toni Trevett, Director of CompleteHR Ltd, is a CIPD qualified and vastly experienced HR practitioner, mediator, consultant, trainer and coach, with a background in general management and HR. She is also an employment law / employee relations specialist and sits part-time to hear cases for the Employment Tribunal judiciary in South London.

Toni has been training for many years, specialising in management development, professional skills and personal development, as well as people management and employment law. She delivers both public courses as well as in-house programmes. Many of her clients book her year after year and give outstanding commendations.

Toni has experience of working with a variety of large global organisations and as well as SME's. She works regularly for a number of clients in a variety of sectors. This includes banking and insurance, legal, manufacturing, professional services, the charity sector, transport and logistics, recruitment, oil and gas, travel, pharmaceutical, technology, education, retail, government, TV, film and media to name just a few.

Toni was formerly a Human Resources Director within the BAA plc group. She is a fellow of the Chartered Institute of Personnel and Development.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Thursday 18 June	Live online using Zoom	CODE: JN18A6

MANAGING CONFLICT AND CONFRONTATION

Speaker: Toni Trevett FCIPD

Objectives: This course is designed to help delegates to handle and deal with difficult behaviours, confrontations and conflict. There are many reasons to engage in conflict, but the bottom line is that the purpose of conflict management is to arrive at a resolution. Effective, constructive conflict management can actually be positive and rewarding. It can be a chance to get to the heart of a problem, rather than only focusing on the surface or obvious issues. Most conflicts have core causes and once those are addressed, conflict management becomes an option to choose rather than avoid. Getting better at handling conflict and confrontation is a powerful skill that benefits both personal and professional life.

Who should attend: Everyone!

Topics:

- How conflict differs from confrontation
- The conflict continuum – from artificial harmony to destructive behaviour
- Start with you – new you, new outcome
- Assertive behaviours
- How trust and respect plays a part
- Early intervention
- Diffusing and de-escalation
- Turning arguments into discussions
- Delivering bad news and giving challenging feedback
- Feeding the solution not the problem
- Constructive conflict and conflict styles
- Going for win – win
- Mediations and third-party intervention

Speaker: Toni Trevett, Director of CompleteHR Ltd, is a CIPD qualified and vastly experienced HR practitioner, mediator, consultant, trainer and coach, with a background in general management and HR. She is also an employment law / employee relations specialist and sits part-time to hear cases for the Employment Tribunal judiciary in South London.

Toni has been training for many years, specialising in management development, professional skills and personal development, as well as people management and employment law. She delivers both public courses as well as in-house programmes. Many of her clients book her year after year and give outstanding commendations.

Toni has experience of working with a variety of large global organisations and as well as SME's. She works regularly for a number of clients in a variety of sectors. This includes banking and insurance, legal, manufacturing, professional services, the charity sector, transport and logistics, recruitment, oil and gas, travel, pharmaceutical, technology, education, retail, government, TV, film and media to name just a few.

Toni was formerly a Human Resources Director within the BAA plc group. She is a fellow of the Chartered Institute of Personnel and Development.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 24 November	Live online using Zoom	CODE: NO24A6

GUARDING THE LEDGER – CYBER SECURITY AND DATA PROTECTION

Speaker: Dr Stephen Hill BSc (Hons) MLPI CIIP PhD, CFE

Objectives: Cyber-crime is a serious threat to the security and integrity of financial data and transactions. Accountants need to be aware of the risks and challenges posed by cyber criminals, and how to prevent, detect and respond to cyber-attacks. This session will provide an overview of the types, methods, and motivations of cyber-crime, as well as the best practices and tools for protecting financial information and systems in line with current data protection legislation.

You will learn how to identify and assess cyber vulnerabilities, how to implement effective cyber security policies and procedures, and how to report and recover from cyber incidents. The session will include practical examples (relevant to small accountancy practices) of good and bad practice, the issues that can arise and how they are overcome giving you a better understanding of the data protection and cyber landscape and how to safeguard your financial data from cyber threats.

Who should attend: Everyone! Data protection is everyone's responsibility.

Topics:

- Explore the current cyber-threats in 2026 and beyond!
- A focus on AI, phishing scams & ransomware attacks
- Recognise your organisation's responsibilities for data security
- GDPR UK & the Data Protection Act 2018 – overview
- Identify the safeguards required to protect your data (DPA & GDPR Principle 6)
- Data Use & Access Bill (Act) & PECR
- Creating a secure culture – IT governance and controls

Speaker: Dr Stephen Hill is the managing director of Hill Bingham Ltd - winner of the Best Internet Investigation Training Provider in the UK, 2023. He is a Certified Fraud Examiner and expert trainer with over 25 years' experience providing services in fraud risk management, cyber security and internet investigations & open-source intelligence. He is also a director of Fraud Training Ltd an Association of Certified Fraud Examiners' (ACFE) Authorised Training Organisation' and the exclusive provider of the Certified Fraud Examiner (CFE) Exam Review Course for the United Kingdom, training counter fraud professionals to the highest level in the field of fraud deterrence, detection and prevention.

He spent over 11 years working for a top international firm of chartered accountants heading the Fraud and Forensic Group, leading an expert body advising clients on prevention, detection and recovery of fraudulent assets, working closely with the police, HMRC and private sector. Stephen spent 12 years as a Trustee Director of the Fraud Advisory Panel and is now a special advisor. He chaired the Fraud Advisory Panel's Cybercrime Working Group with colleagues from the public, private, and third sectors. He is an honorary member of the London Fraud Forum and sits on the Association of Certified Fraud Examiners (ACFE) UK Chapter committee. Stephen spent over 2 years training the NCA (National Crime Agency) and their National Cyber Crime Unit (NCCU) using OSINT to assist in global internet investigations.

Dr Hill is a keynote speaker presenting at conferences in the UK, Europe, UAE, Australasia, USA and SE Asia aimed at both corporate and regulatory sectors on the topics of cybercrime, internet investigations and counter fraud.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online

Thursday 4 June	Live online using Zoom	CODE: JN04B6
-----------------	------------------------	--------------

AI FOR ACCOUNTANTS: HOW THE FINANCE FUNCTION COULD BE IMPROVED

Speaker: Dr Stephen Hill BSc (Hons) MLPI CIIP PhD, CFE

Objectives: In the modern business environment, SMEs must constantly struggle to optimise their performance. The finance function, with the characteristic of manual processes and data complexities, can hugely benefit from the advances in technology. This course will go into detail about how conversational AI tools such as Microsoft Copilot and ChatGPT can augment AI in the financial sector. AI-based systems give various options to accounting and finance teams that will lead to a more efficient and strategic outlook. These can help in simplifying the problems of data discovery and manual tasks that take a lot of time. AI chatbots, also known as virtual financial assistants, can help in increasing the efficiency of the organisation by being able to solve queries instantly, generate reports, and complete routine tasks through simple commands. In particular, making clear the complex taxation regulations or comparing the expenses reports of the previous financial quarters to the current one takes less time.

With the introduction of AI tools for handling routine duties, the finance staff gets the chance to focus on complex activities that require special skills. This change of role fosters more focus on cost optimisation, strategic financial planning, and the search for new business opportunities. The implementation of AI in finance is a great way to extend the capabilities of the finance team in the organisation and also to tap into the unexploited resources.

Topics

- AI Basics for Accountants
- Using AI Tools (Copilot & ChatGPT)
- Automating Finance Tasks
- AI for Deep Research (Google Gemini)
- Implementing AI in Your Firm

Who should attend: Everyone! Data protection is everyone's responsibility.

Speaker: Dr Stephen Hill is the managing director of Hill Bingham Ltd - winner of the Best Internet Investigation Training Provider in the UK, 2023. He is a Certified Fraud Examiner and expert trainer with over 25 years' experience providing services in fraud risk management, cyber security and internet investigations & open-source intelligence. He is also a director of Fraud Training Ltd an Association of Certified Fraud Examiners' (ACFE) Authorised Training Organisation' and the exclusive provider of the Certified Fraud Examiner (CFE) Exam Review Course for the United Kingdom, training counter fraud professionals to the highest level in the field of fraud deterrence, detection and prevention.

He spent over 11 years working for a top international firm of chartered accountants heading the Fraud and Forensic Group, leading an expert body advising clients on prevention, detection and recovery of fraudulent assets, working closely with the police, HMRC and private sector. Stephen spent 12 years as a Trustee Director of the Fraud Advisory Panel and is now a special advisor. He chaired the Fraud Advisory Panel's Cybercrime Working Group with colleagues from the public, private, and third sectors. He is an honorary member of the London Fraud Forum and sits on the Association of Certified Fraud Examiners (ACFE) UK Chapter committee. Stephen spent over 2 years training the NCA (National Crime Agency) and their National Cyber Crime Unit (NCCU) using OSINT to assist in global internet investigations.

Dr Hill is a keynote speaker presenting at conferences in the UK, Europe, UAE, Australasia, USA and SE Asia aimed at both corporate and regulatory sectors on the topics of cybercrime, internet investigations and counter fraud.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

AM	Waiting Room: 09:00	Course starts: 09:30	Break: 11:00	Course ends: 12:30
----	---------------------	----------------------	--------------	--------------------

Live Online

Thursday 2 July	Live online using Zoom	CODE: JY02A6
-----------------	------------------------	--------------

THE ART OF OPEN SOURCE INTELLIGENCE: UNLOCKING THE DIGITAL WORLD

Speaker: Dr Stephen Hill BSc (Hons) MLPI CIIP PhD

Objectives: In today's interconnected world, financial professionals are increasingly tasked with due diligence, fraud detection, and risk assessment. Open Source Intelligence (OSINT) provides a powerful toolkit for gathering and analysing publicly available information, enabling accountants to enhance their investigations and make more informed decisions. This session will demystify OSINT, offering practical techniques and tools to navigate the digital landscape effectively. We'll explore how to leverage publicly accessible data to uncover hidden connections, verify information, and mitigate potential risks in the surface, deep and dark web.

Learning Objectives:

- Learn how to effectively utilize search engines, social media platforms, public records, and other online resources
- Discover how to verify the legitimacy of clients, suppliers, and business partners
- Beyond Google - master key OSINT techniques and tools
- Identify red flags and potential fraudulent activities through online research
- Understand legal and ethical implications

Who should attend: Accountants (auditors, forensic, tax, analysts), Compliance/Due Diligence/Risk Professionals, and anyone in finance wanting to improve online research skills.

Topics:

- The Business Impact of OSINT: Understanding how OSINT drives competitive advantage, due diligence, and risk assessment
- Advanced Search Strategies: Moving beyond basic search engines to utilise specialised tools and techniques for targeted information retrieval
- Social Media Intelligence: Extracting valuable insights from social platforms for market research, reputation management, and threat detection
- Deep Web Exploration: Navigating the deep web to access hidden data and uncover valuable intelligence.
- Public Databases and Archives: Utilising government records, open data initiatives, and archival resources for comprehensive research
- OSINT for Due Diligence and Discovery: Applying OSINT techniques to verify information, conduct background checks, and support legal proceedings
- Online Identity Protection: Implementing best practices for secure browsing, anonymity, and data privacy during OSINT investigations

Speaker: Dr Stephen Hill is the managing director of Hill Bingham Ltd specialising in online investigations, cybercrime and data protection and compliance. Stephen spent many years working for a top firm of chartered accountants heading the Fraud and Forensic Group, leading an expert body advising clients on prevention, detection and recovery of fraudulent assets, working closely with organisations in both the public and private sector. He spent over 12 years a Trustee Director of the Fraud Advisory Panel and chaired the Panel's Cybercrime Working Group and continues as an adviser to the board. He is also an honorary member on the steering committee of the London Fraud Forum and is a committee member of the Association of Certified Fraud Examiners UK Chapter.

With an appointment as a Volunteer to the City of London Police Economic Crime Directive, Stephen assists fraud investigators with the aid of online investigation techniques and speaks at schools on the dangers of the Internet in line with his role as a safeguarding and child protection governor at his local primary school.

Dates, venue and timing: Set out below are the dates and timings for the course. The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

PM	Waiting Room: 13:00	Course starts: 13:30	Break: 15:00	Course ends: 16:30
----	---------------------	----------------------	--------------	--------------------

Live Online		
Tuesday 21 April	Live online using Zoom	CODE: AP21B6

WHY POWER QUERY IS THE MOST IMPORTANT EXCEL DEVELOPMENT EVER – EVEN IF YOU DON'T WORK WITH DATA!

Speaker: Simon Hurst BA ACA

Objectives: To enable attendees to use the Excel Power Query tools to make their use of Excel more reliable, more efficient and more automatic.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Who should benefit: Anyone whose use of Excel goes beyond the basics and ventures into the use of lookups and conditional sums. Anyone who works with external data or data stored in Excel worksheets and hasn't yet explored the Power Query tools in detail. Even if you don't work with external data, this course should help you to create spreadsheets that are more reliable and more automatic.

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- An introduction to the Power Query/Get & Transform tools
- Power Query techniques that make Excel more dynamic and automatic
- VLOOKUP() RIP – why Power Query replaces all Excel lookup functions
- Think in more dimensions – escape the cell straitjacket
- Use Power Query to solve the insoluble
- Using Power Query to replace PivotTables
- Troubleshooting Power Query problems
- Case study – one-click management accounts: complete automation with Power Query

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCO website	Code: EX01A6

GOOD SPREADSHEET PRACTICE: EXCEL FUNDAMENTALS

Speaker: Simon Hurst BA ACA

Our special New Employee Word & Excel Productivity Courses Bundle (page 92) makes this Excel course available, together with 'Essential Word Productivity Skills and Techniques for Accountants' (page 91), at a combined fee of £110+VAT (half the standard fee).

Objectives: Principle 3 of the ICAEW 20 Principles for good spreadsheet practice states: "Ensure that everyone involved in the creation or use of spreadsheets has an appropriate level of knowledge and competence". This course seeks to cover that attendees have at least the required level of knowledge and competence.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Who should attend: This course is aimed at new or existing users of Excel who wish to ensure that they possess the skills and knowledge required to use Excel efficiently and safely while delivering effective and reliable end results. No particular prior knowledge is required. If you are already an experienced Excel user with a comprehensive understanding of a wide range of Excel features and functions then the course might be of limited direct benefit, although it might still be a useful guide to understanding what others working with spreadsheets in your organisation need to know. Examples will be based on the latest version of Excel but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

This course is suitable for the levels "Basic User to General User" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- Excel anatomy: how everything fits together and how worksheets and workbooks should be set up to be as efficient and reliable as possible
- Formula fundamentals: cell references, calculations, brackets, what the dollar signs do and why it's essential that you know. The most common Excel formula mistake and why avoiding it will save you time, effort and grief. The importance of Excel Tables, and why Dynamic Arrays change everything you thought you knew about Excel formulas
- Function fundamentals: What functions are and how to use them safely. Key functions SUM(), IF(), SUMIFS(), XLOOKUP()
- Effective formatting: cell formats, Styles, number and date formats, Conditional Formats, Charts and graphics
- Fundamental features: working with data, PivotTables, Data Validation
- Is it right? Testing your spreadsheet and building in checks and controls
- Tips and shortcuts – keyboard and other shortcuts to work more efficiently and impress your colleagues

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX02A6

USING THE LATEST VERSIONS OF EXCEL TO REVOLUTIONISE YOUR SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: Since the introduction of Office 365, significant Excel changes and enhancements have been delivered as frequently as monthly. The increased number of updates makes it increasingly easy to miss a change that could have the potential to dramatically improve your use of Excel. This course covers the most significant changes after the initial introduction of Excel 2016. If you are upgrading from an earlier version, we will also include a PDF detailing the changes from 2007 up to Excel 2016.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Who will benefit: Users of Microsoft Excel that haven't yet upgraded to the latest version and are wondering whether they should. Users of Microsoft Excel that have recently upgraded and want to make sure they're getting the most out of the new version. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

This course is suitable for all levels under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/technical/technology/excel/spreadsheet-competency-framework.

Topics: will include:

- Why VLOOKUP() is now an X function – a new better, safer, cleverer and easier way to create lookups in Excel
- Dynamic arrays – use one formula to populate hundreds of cells dynamically. One of the most significant structural changes ever made to the way that Excel works and one that can also affect existing workbooks, plus it comes with more than a dozen new functions, including the formula that creates a PivotTable that doesn't need to be refreshed.
- New functions, including supercharging IF()
- Maps and funnels – new chart types since Excel 2016
- New data types – stocks, geography and currencies
- Office Scripts – a new alternative to macros for automating spreadsheets
- The Excel BI revolution – from spreadsheet to Business Intelligence engine. Where most of the Excel update effort is going
- Because of the way that Excel is now being continually updated, there are likely to be further significant changes between the production of this overview and the date of the course
- It's AI(I) Over Now – how Microsoft's use of AI will do all the work for you...

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCO website	Code: EX03A6

50 ADVANCED TECHNIQUES FOR CREATING INSPIRATIONAL SPREADSHEETS

Speaker: Simon Hurst BA ACA

Objectives: The course is designed to address some more advanced Excel features and capabilities that will be of use to those working with financial data. Some significant new features in recent versions of Excel will be covered, but most of the course will be relevant to users of any Excel version. The intention is to cover areas that provide real practical benefits including making spreadsheets more automatic, more reliable and also increasing their impact through improved presentation.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

The examples are based on the latest version of Excel but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Who will benefit: The course will assume a familiarity with some Excel subjects, e.g.:

- Absolute and relative cell references
- Excel functions such as IF(), VLOOKUP() and XLOOKUP(), SUMIF()
- Basic chart creation
- Basic PivotTables

This course is suitable for the levels “General User to Developer” under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework. Previous attendance on any existing SESCA Excel courses, or other similar courses, should provide adequate preparation for this course. If you already use complex financial functions, understand array formulas and dynamic array formulas and functions, make extensive use of Excel data analysis tools including Power Query and PivotTables and write or edit VBA code or Office Scripts, then the course may well be of limited benefit to you.

Topics:

- Advanced use of functions – including using apparently simple functions to save hours of manual effort
- Excel formulas and techniques – including the revolutionary Dynamic Array formulas and advanced aspects of range names
- Macros, Visual Basic and Office Scripts. Creating user-defined functions, editing and writing macros and Office Scripts. Increasing interactivity and automating spreadsheets
- Data analysis tools – working efficiently with external data and using extended data tools and PivotTable features
- Superpower functions – the functions with hidden powers that can revolutionise your use of Excel
- Presentation – improving general spreadsheet presentation and making charts better. Using the latest Excel graphics features to create inspirational spreadsheets
- How Power Query changes everything. Excel without formulas

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX04A6

MORE POWER TO YOUR PIVOT: PRACTICAL USES FOR EXCEL PIVOT TABLES

Speaker: Simon Hurst BA ACA

Objectives: PivotTables are one of Excel's most powerful features, but they seem to divide Excel users into fanatical advocates and those who just don't see the point. This course will explain how PivotTables can be useful to almost any Excel user. Starting with the basics of using a simple PivotTable to summarise financial data it will show how PivotTables can simplify a range of practical Excel tasks from identifying best-selling products to consolidating branch data and acting as the engine for an automated performance dashboard. The course will also introduce some of the other key Excel features for working with, and presenting, data.

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided, together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Examples will be based on the latest version of Excel but where an earlier version (2010 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Excel for Windows rather than Excel for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

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

This course is suitable for the levels "General User to Developer" under the ICAEW IT Faculty Spreadsheet Competency Framework. For more information visit www.icaew.com/en/technical/information-technology/excel/spreadsheet-competency-framework.

Topics:

- Introduction to PivotTables - from raw data to your top ten products in 5 minutes with no formulas
- Dealing with data - different ways of getting at your data and keeping it updated automatically. Consolidating data from different parts of your organisation
- Manipulating PivotTables - sorting, filtering, grouping and formatting
- Advanced techniques - ad hoc grouping, adding formulas and working with values
- PivotTable as report engine - using a PivotTable to automate the production of management reports
- Using a PivotTable to create an automated performance dashboard
- Latest PivotTable developments - conditional formatting, Excel 2010 slicers. PowerPivot, 3D Map, Power BI and Power Query (now known as 'Get & Transform' from Excel 2016) - possibly the most significant Microsoft Office development of the millennium?

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: EX05A6

ESSENTIAL WORD PRODUCTIVITY SKILLS AND TECHNIQUES FOR ACCOUNTANTS

Speaker: Simon Hurst BA ACA

Our special New Employee Word & Excel Productivity Courses Bundle (page 92) makes this Word course available, together with 'Good Spreadsheet Practice: Excel Fundamentals' (page 87), at a combined fee of £110+VAT (half the standard fee).

Objectives: Many of us will end up wasting at least 1.3 year's worth of our working lives through inefficient use of Microsoft Word*. Investing a morning in taking this course will help you to use Word far more efficiently and show you the best ways to address relevant issues, such as dealing with columns of figures and making document formatting quick and consistent.

* Completely spurious statistic, made up on the spot (but probably an underestimate).

This is delivered as an online course using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Who should attend: This course is aimed at all Word users who wish to ensure that they possess the skills and knowledge required to use Word efficiently to deliver a high-quality result. It covers a range of skills and techniques of particular relevance to those working with financial information and producing professional documents.

No particular prior knowledge is required. Examples will be based on the latest version of Word but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Word for Windows rather than Word for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Topics:

- Using the Word interface to help you work more quickly
- Faster formatting for characters, paragraphs and professional business graphics
- Learn how to deal properly with widows and orphans
- Automating whole paragraphs of content with a few keystrokes
- The ten best ways to save time using Word
- From frustration to elation – automate list and paragraph numbering in Word
- Conquering columns using Word tables
- Recent Word improvements and developments

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for each course is £110+VAT (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	3 hour recorded online course accessed via the SESCA website	Code: WD01A6

NEW EMPLOYEE WORD AND EXCEL PRODUCTIVITY COURSES BUNDLE

Speaker: Simon Hurst BA ACA

Objectives: Dramatically improve productivity by ensuring that all your employees have the key skills required to use Excel and Word efficiently and safely. Although most of us can use Excel and Word, there is a big difference between being able to use these applications and being able to use them efficiently. This bundle of two courses aims to help your entire team reach an excellent level of competence in just a few hours.

Excel Fundamentals provides a comprehensive grounding in the principles and techniques required to create reliable, robust spreadsheets quickly and efficiently with reference to the ICAEW 20 Principles for Good Spreadsheet Practice. The Word course recognises that everyone can use Word and concentrates on tips, shortcuts and techniques useful to those working with financial data.

Online courses: We moved to providing IT courses online out of necessity, but they have proved extremely popular and we have found that they offer some significant advantages over live courses. Both courses are delivered using a narrated, high-definition screen recording. This allows an individual to access the course from anywhere, as often as they like, for as long as they like, within the month. Full notes are provided together with a comprehensive practice workbook and also email access to the speaker to answer queries. Further details of how our series of online courses work are available on the back inside cover.

Who should attend: New employees or existing employees who feel that they could benefit from ensuring they have an adequate knowledge of how to use Excel and Word safely and efficiently. No particular prior knowledge is required. Examples will be based on a recent version of Office and but where an earlier version (2007 onwards) differs substantially this will be highlighted on the course. The course is based on the use of Office for Windows rather than Office for Mac and, although the content might still be useful for Mac users, they should ensure that any key features are available in the version that they are intending to use.

Key Topics:

Excel

- Formula fundamentals: cell references, calculations, brackets, what the dollar signs do and why it's essential that you know. The most common Excel formula mistake and why avoiding it will save you time, effort and grief. The importance of Excel Tables, and why Dynamic Arrays change everything you thought you knew about Excel formulas
- Function fundamentals: What functions are and how to use them safely. Key functions: SUM(), IF(), SUMIFS(), XLOOKUP()
- Fundamental features: working with data, PivotTables, Data Validation
- Is it right? Testing your spreadsheet and building in checks and controls
- Tips and shortcuts – keyboard and other shortcuts to work more efficiently and impress your colleagues

Word

- Faster formatting for characters, paragraphs and professional business graphics
- Automating whole paragraphs of content with a few keystrokes
- The ten best ways to save time using Word
- Conquering columns using Word tables
- Recent Word improvements and developments

Fuller details of the individual courses can be found on pages 87 and 91.

Speaker: Simon Hurst, a Chartered Accountant has been involved in computer software for over 20 years. His training organisation, The Knowledge Base (www.tkb.co.uk) provides a wide range of training and consultancy services to accountants and other professionals.

Fee: The standard fee for this bundle of 2 courses is £110+VAT (2 for the price of 1) (see page 4 for Flexiticket fees).

Recorded Online		
Available anytime with one month's access	Bundle of two 3 hour recorded online courses accessed via the SESCO website	Code: WE02A6

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
2026	Ethics - Practising Professionalism	J.Williams	All	W	ANY	76
2026	Ethics - Ethical Decision-Making for Accountants in Business or Practice Refresher	J.Williams	All	W	ANY	77
2026	Why Power Query is the Most Important Development Ever - Even if You Don't Work with Data!	S.Hurst	All	W	ANY	86
2026	Good Spreadsheet Practice - Excel Fundamentals	S.Hurst	All	W	ANY	87
2026	Using the Latest Versions of Excel to Revolutionise Your Spreadsheets	S.Hurst	All	W	ANY	88
2026	50 Advanced Techniques for Creating Inspirational Spreadsheets	S.Hurst	All	W	ANY	89
2026	More Power to Your Pivot - Practical Uses for Excel Pivot Tables	S.Hurst	All	W	ANY	90
2026	Essential Word Productivity Skills and Techniques for Accountants	S.Hurst	All	W	ANY	91
2026	New Employee Word and Excel Productivity Courses Bundle	S.Hurst	All	W	ANY	92
26 Feb	Hot Topics in VAT	N.Owen	All	O	AM	38
26 Feb	Complete Guide to Tax Planning for Small Businesses	M.Ward	All	O	PM	11
03 Mar	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	All	O	AM	56
03 Mar	Companies Act Refresher	J.Selwood	All	O	PM	59
04 Mar	PAYE and National Insurance Update	A.Durrant	All	O	AM	12
04 Mar	Introduction to Pension Scheme Accounts	M.Norbury	All	O	PM	68
05 Mar	A Practical Approach to Forms P11D	A.Durrant	All	O	AM	13
06 Mar	Introduction to Charity Accounts	P.Herbert	All	O	AM	66
10 Mar	Tax Efficient Extraction of Funds from the Family Business	T.Palmer	All	O	AM	26
11 Mar	Impact of Brexit and the Subsequent EU – UK Agreements on Business and Taxation	J.Mindell	All	O	AM	23
12 Mar	LLP Refresher and Update	P.Herbert	All	O	AM	60
12 Mar	Capital Gains Tax for Owner Managed Businesses	M.Ward	All	O	PM	32
13 Mar	Pension Accounting, Audit and Regulatory Update	M.Norbury	All	O	AM	69
17 Mar	Common Issues from Audit Cold File Reviews and How to Avoid Them	K.McCaffrey	All	O	AM	64
17 Mar	Hot Topics in International Tax	J.Mindell	All	O	PM	22
18 Mar	SRA Accounts Rules Annual Update	J.Taylor	All	O	AM	58
18 Mar	PAYE and National Insurance Update	A.Durrant	All	O	PM	12
19 Mar	Complete Guide to International VAT Issues	N.Owen	All	O	DAY	39

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
24 Mar	Tales of the Unexpected: VAT Cases with Outcomes Good and Bad	N.Owen	All	O	AM	43
24 Mar	A Practical Approach to Forms P11D	A.Durrant	All	O	PM	13
25 Mar	Pensions - What the Accountant Needs to Know	M.Ingles	All	O	AM	28
26 Mar	Businesses in Trouble - Helping Your Clients in Times of Crisis	P.Ridgway	All	O	AM	80
14 Apr	IHT - Beyond the Basics	M.Ward	All	O	AM	31
15 Apr	Complete Guide to Acting for Small Businesses	M.Ingles	All	O	AM	27
16 Apr	HMRC Investigations	J.Mindell	All	O	AM	20
16 Apr	Employment and Business Law Update	L.Dunford	All	O	PM	72
21 Apr	Essential Guide to Share and Business Valuations	D.Bowes	All	O	AM	78
21 Apr	The Art of Open Source Intelligence: Unlocking the Digital World	S.Hill	All	O	PM	85
22 Apr	Corporation Tax Update	G.Mooney	All	O	AM	19
22 Apr	Effective Narrative Reporting	V.Steward	All	O	PM	53
23 Apr	Annual IFRS Update	G.Loveday	All	O	AM	52
23 Apr	Complete Guide to VAT and Property Transactions	N.Owen	All	O	PM	41
28 Apr	Charity Audit and Independent Examination Update	P.Herbert	All	O	AM	67
28 Apr	Topical Tax Issues for Owner Managed Businesses	M.Ward	All	O	PM	10
29 Apr	Trusts: Update and Planning Using Client Case Studies	A.Fisher	All	O	AM	34
29 Apr	Tax Planning in Difficult Economic Times	G.Mooney	All	O	PM	18
06 May	The Accountant on the Farm - A Comprehensive Review	D.Missen & G.Pilcher	All	O	AM	21
06 May	Housing Associations Accounting and Audit Update	V.Steward	All	O	PM	70
07 May	Capital Taxes Update	M.Ward	All	O	AM	33
07 May	Complete Guide to Tax and the Family	M.Ward	All	O	PM	25
08 May	Complete Guide to Essential VAT for Charities	N.Owen	All	O	AM	40
11 May	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	All	O	PM	55
12 May	Taxation Update	G.Mooney	All	O	AM	7
12 May	Audit and Accounting Update	G.Loveday	All	O	PM	48
12 May	Accounting and Financial Reporting Update	G.Loveday	All	O	AM	49
12 May	Taxation Update	G.Mooney	All	O	PM	7
15 May	GenAI in Audit and Assurance	P.Beard	All	O	AM	61

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
19 May	Accounting Update for Accountants in Business	G.Loveday	All	O	AM	50
19 May	Taxation Update for Accountants in Business	M.Ingles	All	O	PM	8
20 May	Accounting Update for Accountants in Business	G.Loveday	SE	D	AM	50
20 May	Taxation Update for Accountants in Business	M.Ingles	SE	D	PM	8
21 May	Topical Issues in Insolvency Seminar ●	Various	SE	D	DAY	99
21 May	A Practical Accounting Brush Up for Returners	K.McCaffrey	All	O	AM	51
21 May	A Practical Tax Brush Up for Returners	R.Benneyworth	All	O	PM	9
02 Jun	VAT Pitfalls and Solutions	D.Wootten	All	O	AM	37
02 Jun	MTD for Income Tax - It's Here!	R.Benneyworth	All	O	PM	17
03 Jun	Accounting and Financial Reporting Update	G.Loveday	SE	M	AM	49
03 Jun	Taxation Update	M.Ward	SE	M	PM	7
04 Jun	Complete Guide to VAT in the Construction Sector	N.Owen	All	O	AM	42
04 Jun	Guarding the Ledger - Cyber Security and Data Protection	S.Hill	All	O	PM	83
09 Jun	Taxation Update	J.Mindell	All	O	AM	7
09 Jun	Accounting and Financial Reporting Update	G.Loveday	All	O	PM	49
09 Jun	Audit and Accounting Update	G.Loveday	All	O	AM	48
09 Jun	Taxation Update	J.Mindell	All	O	PM	7
10 Jun	Charity Trusteeship: Getting it Right for Finance Professionals	C.D'cruz	All	O	AM	75
10 Jun	Dealing with Common Property Transactions	M.Ward	All	O	PM	36
11 Jun	Complete Guide to the Partial Exemption and the Capital Goods Scheme	N.Owen	All	O	AM	44
11 Jun	Payroll Services for Clients - Practical Problems	A.Durrant	All	O	PM	14
15 Jun	Accounting Update for Accountants in Business	G.Loveday	TV	CB	AM	50
15 Jun	Taxation Update for Accountants in Business	M.Ingles	TV	CB	PM	8
16 Jun	Accounting for and Auditing Academy Schools Update	J.Charlton	All	O	AM	57
16 Jun	MTD for Income Tax - It's Here!	R.Benneyworth	All	O	PM	17
17 Jun	Taxation Update	M.Ward	All	O	AM	7
17 Jun	Audit and Accounting Update	G.Loveday	All	O	PM	48
17 Jun	Accounting and Financial Reporting Update	G.Loveday	All	O	AM	49
17 Jun	Taxation Update	M.Ward	All	O	PM	7
18 Jun	Managing Change	T.Trevett	All	O	AM	81
19 Jun	Taxation Update for Accountants in Business	M.Ingles	All	O	AM	8
19 Jun	Accounting Update for Accountants in Business	G.Loveday	All	O	PM	50

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
24-26 Jun	Taxation Conference 2026 ●	Various	SE	KU	C	46
26 Jun	Tax Conference - Topical Tax Tips and Pitfalls *	G.Mooney	SE	KU	AM	45
29 Jun	Accounting Update for Accountants in Business	G.Loveday	SE	P	AM	50
29 Jun	Taxation Update for Accountants in Business	M.Ingles	SE	P	PM	8
29 Jun	Taxation Update	J.Mindell	SE	P	AM	7
29 Jun	Audit and Accounting Update	G.Loveday	SE	P	PM	48
02 Jul	AI for Accountants: How the Finance Function Could Be Improved	S.Hill	All	O	AM	84
02 Jul	Construction Industry Tax Refresher	T.Palmer	All	O	PM	35
08 Jul	Complete Guide to Tax Planning for Small Businesses	M.Ward	All	O	AM	11
09 Sep	A Practical Tax Brush Up for Returners	R.Benneyworth	All	O	AM	9
09 Sep	A Practical Accounting Brush Up for Returners	K.McCaffrey	All	O	PM	51
10-11 Sep	Insolvency Conference 2026 ●	Various	SE	RU	C	99
15 Sep	Topical Tax Issues for Owner Managed Businesses	M.Ward	All	O	AM	10
15 Sep	Hot Topics in VAT	N.Owen	All	O	PM	38
16 Sep	Payroll Services for Clients - Practical Problems	A.Durrant	All	O	AM	14
16 Sep	Capital Gains Tax and Inheritance Tax Refresher	M.Ward	All	O	PM	30
17 Sep	Acting for Doctors Update	N.Stevenson	All	O	AM	29
17 Sep	Trusts: Update and Planning Using Client Case Studies	A.Fisher	All	O	PM	34
18 Sep	Introduction to Root Cause Analysis	K.McCaffrey	All	O	AM	65
22 Sep	Complete Guide to Acting for Small Businesses	M.Ingles	All	O	AM	27
22 Sep	Accounting for Directors' and Related Party Loans and Transactions	P.Herbert	All	O	PM	56
24 Sep	Essential Guide to Tax Issues on Buying, Selling and Closing Down Businesses	K.Read	All	O	DAY	24
29 Sep	Judgement and Scepticism – Improving the Audit Approach	R.Tiffin	All	O	AM	62
29 Sep	Pensions - What the Accountant Needs to Know	M.Ingles	All	O	PM	28
01 Oct	A Practical Introduction to Payroll	A.Durrant	All	O	AM	15
01 Oct	IR35 - Where are we now?	T.Palmer	All	O	PM	16
06 Oct	Essential Guide to Share and Business Valuations	D.Bowes	All	O	AM	78
06 Oct	Capital Taxes Update	M.Ward	All	O	PM	33
07 Oct	Employment and Business Law Update	L.Dunford	All	O	AM	72
07 Oct	Annual IFRS Update	G.Loveday	All	O	PM	52

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
08 Oct	Corporation Tax Update	G.Mooney	All	O	AM	19
08 Oct	Topical Audit Problems and Solutions	J.Selwood	All	O	PM	63
09 Oct	A Practical Approach to Forms P11D	A.Durrant	All	O	AM	13
13 Oct	Complete Guide to VAT and Property Transactions	N.Owen	All	O	AM	41
13 Oct	Problems Commonly Encountered under IFRS and FRS 102 - and Solutions!	G.Loveday	All	O	PM	54
14 Oct	Dealing with Common Property Transactions	M.Ward	All	O	AM	36
14 Oct	Generating More Fees From Advisory Services	M.Lee	All	O	PM	79
15 Oct	GenAI in Audit and Assurance	P.Beard	All	O	AM	61
15 Oct	Topical Issues in Insolvency Seminar ●	Various	SE	D	DAY	99
20 Oct	Tax Planning in Difficult Economic Times	G.Mooney	All	O	AM	18
21 Oct	Charities Update	J.Rowe	All	O	AM	73
21 Oct	Charities Legal Update	C.D'cruz	All	O	PM	74
22 Oct	Complete Guide to International VAT Issues	N.Owen	All	O	DAY	39
03 Nov	Anti-Money Laundering and Fraud Refresher and Update	P.Herbert	All	O	AM	55
04 Nov	Construction Industry Tax Refresher	T.Palmer	All	O	AM	35
05 Nov	Complete Guide to Tax and the Family	M.Ward	All	O	AM	25
05 Nov	Complete Guide to VAT in the Construction Sector	N.Owen	All	O	PM	42
10 Nov	Taxation Update	G.Mooney	All	O	AM	7
10 Nov	Audit and Accounting Update	G.Loveday	All	O	PM	48
10 Nov	Accounting and Financial Reporting Update	G.Loveday	All	O	AM	49
10 Nov	Taxation Update	G.Mooney	All	O	PM	7
11 Nov	Charities Update	J.Rowe	All	O	AM	73
11 Nov	Charities Legal Update	C.D'cruz	All	O	PM	74
12 Nov	Capital Gains Tax for Owner Managed Businesses	M.Ward	All	O	AM	32
12 Nov	VAT Pitfalls and Solutions	D.Wootten	All	O	PM	37
16 Nov	Taxation Update for Accountants in Business	M.Ingles	All	O	AM	8
16 Nov	Accounting Update for Accountants in Business	G.Loveday	All	O	PM	50
17 Nov	Taxation Update for Accountants in Business	M.Ingles	SE	D	AM	8
17 Nov	Accounting Update for Accountants in Business	G.Loveday	SE	D	PM	50
18 Nov	Tax Efficient Extraction of Funds from the Family Business	T.Palmer	All	O	AM	26
18 Nov	IHT - Beyond the Basics	M.Ward	All	O	PM	31
19 Nov	Taxation Update for Accountants in Business	M.Ingles	TV	CB	AM	8
19 Nov	Accounting Update for Accountants in Business	G.Loveday	TV	CB	PM	50

2026 CPD PROGRAMME

Date	Course	Speaker	Area	Venue	Time	Page
20 Nov	Common Issues from Audit Cold File Reviews and How to Avoid Them	K.McCaffrey	All	O	AM	64
23 Nov	Taxation Update	M.Ward	All	O	AM	7
23 Nov	Accounting and Financial Reporting Update	G.Loveday	All	O	PM	49
23 Nov	Audit and Accounting Update	G.Loveday	All	O	AM	48
23 Nov	Taxation Update	M.Ward	All	O	PM	7
24 Nov	Managing Conflict and Confrontation	T.Trevett	All	O	AM	82
25 Nov	Taxation Update for Accountants in Business	M.Ingles	SE	P	AM	8
25 Nov	Accounting Update for Accountants in Business	G.Loveday	SE	P	PM	50
25 Nov	Accounting and Financial Reporting Update	G.Loveday	SE	P	AM	49
25 Nov	Taxation Update	G.Mooney	SE	P	PM	7
27 Nov	Accounting Update for Accountants in Business	G.Loveday	All	O	AM	50
27 Nov	Taxation Update for Accountants in Business	M.Ingles	All	O	PM	8
01 Dec	Taxation Update	G.Mooney	SE	M	AM	7
01 Dec	Audit and Accounting Update	G.Loveday	SE	M	PM	48
03 Dec	Taxation Update	M.Ward	All	O	AM	7
03 Dec	Audit and Accounting Update	G.Loveday	All	O	PM	48
03 Dec	Accounting and Financial Reporting Update	G.Loveday	All	O	AM	49
03 Dec	Taxation Update	M.Ward	All	O	PM	7

KEY: ● = Events not available on the Flexiticket * = 09:15 – 12:30

AM = 09:30 – 12:30 **PM** = 13:30 – 16:30 **D** = Day course – timings vary – see individual course information

C = Residential conference - timings vary – see individual conference information

KEEP TRACK OF YOUR CPD

To help you keep your CPD records up to date we send to every delegate on the Flexiticket scheme an annual report in January, of courses attended in the previous 12 months. Reports can be requested at any time of the year, please email courses@sesca.co.uk or call 01737 223999.

VENUES

Set out below is information on all our venues.

Directions to all venues are available on the website www.sesca.co.uk/venues

South East

Denbies Wine Estate	D	London Road, Dorking RH5 6AA Tel: 01306 876616
Mercure Maidstone, Great Danes Hotel	M	Ashford Road, Hollingbourne, Maidstone, ME17 1RE Tel: 01622 528 565
University of Reading	RU	Whiteknights, PO Box 217, Reading, RG6 6AH Tel: 0118 378 5657
University of Canterbury	KU	Kent University, Canterbury, CT2 7LX Tel: 01227 828 000

Southern

Portsmouth Marriott Hotel	P	Southampton Road, Portsmouth, PO6 4SH Tel: 02392 383 151
---------------------------	----------	---

Thames Valley

Coppid Beech Hotel	CB	John Nike Way, Binfield, Bracknell, RG12 8TF Tel: 01344 303 333
--------------------	-----------	--

Online Courses

Live Online	O	Live online using Zoom – delegates will be emailed joining information two days before the course date
Recorded Online	W	Recorded course accessed via the website – delegates will be emailed information to access the course

SESCA ANNUAL RESIDENTIAL TAX CONFERENCE 24–26 June at the University of Kent, Canterbury

A two-and-a-half-day residential conference providing an intensive update on taxation for general practitioners as well as specialists and accountants in business.

£400+VAT, or £380+VAT if booked and paid for by 30 April 2026. (Accommodation not included, see page 46.)

SESCA ANNUAL RESIDENTIAL INSOLVENCY CONFERENCE 10-11 September at the University of Reading

A value for money update over one and a half days, for Insolvency Practitioners covering a wide range of technical and professional issues.

£350+VAT, or £335+VAT if booked and paid for by 31 May 2026.
(Accommodation not included.)

SESCA TOPICAL ISSUES IN INSOLVENCY SEMINARS 21 May and 15 October at Denbies Wine Estate, Dorking

Spring and Autumn one day seminars providing technical and professional updating for Insolvency Practitioners and their senior staff on a range of topical issues.

£200+VAT per day, or book both days for £350+VAT.

SESCA COURSES: FACE-TO-FACE, LIVE ONLINE AND RECORDED ONLINE

Face-to-Face and Live Online Courses

SESCA Face-to-Face Courses: Our face-to-face courses are available for anyone to attend. Course materials are provided on the day. Our venues have excellent facilities and ample parking. Registration and coffee breaks are an ideal chance to network and meet new people, something that can't be replicated online. Reminders are emailed to delegates one week before the course date.

Live Online Courses: Our live online CPD courses are available for anyone to attend from the comfort of their laptop/PC. The courses are run using Zoom. During the course, questions can be asked via the chat box facility. Delegates will receive the same quality training with the convenience of not having to leave their desk!

Delegates are emailed the course materials in PDF format and a Zoom link two days before each course date. Delegates may request a hard copy of any course materials, to be sent after the course date, by emailing info@sesc.co.uk

Courses are available individually or may be booked using any Flexiticket.

Recorded Online Excel, Word and Ethics Courses

Recorded Online Ethics Courses: Our one-hour and two-hour long Ethics courses are offered recorded online, available at any time. Email courses@sesc.co.uk to book your one-year access. Delegates are emailed the course notes and slide pack in PDF format and a weblink with access codes. Delegates can watch the courses at their own pace and return to them as many times as they wish within the year. Both Ethics courses may be attended using 1 place on the Flexiticket using our Ethics bundle deal. Please see pages 76 & 77 for more information.

Recorded Online Excel and Word Courses: All our Excel and Word courses are offered as recorded online courses available at any time. Each course is accompanied by a full set of notes and example Excel workbooks or Word files to enable delegates to work through the content at their own pace. Delegates can pause, rewind and return to the recording as many times as they wish within the month. Delegates are emailed the course materials and weblink with one-month access code. Courses are available individually or may be booked using any Flexiticket. Please see pages 86-92 for more information.

WHAT OUR CLIENTS SAY:

"We'll definitely be using you again as the courses by SESCO are by far the best we've found." – Helen Clements, Troy Accounting Ltd.

"Giles was fantastic as always, bringing wit and humour to encourage engagement. Thanks once again for another fabulous course." – Sara Pettitt, Kumar Associates, attended Corporation Tax Update, 29th April 2025.

"Jez was brilliant – really likeable, clear, professional, articulate, and really funny, making the course entertaining and engaging instead of a 'tick-box' ethics course. The case studies were interesting and different to any I've seen before." – Charlotte Falconer, Checktrade, attended Ethics – Ethical Decision-Making for Accountants in Business 2025.

"Guy Loveday is an excellent speaker and prepares very good course notes which serve for future reference." – Chris Reed, Reeds, attended Accounting and Financial Reporting Update, 12th June 2025.

"I think the residential course is excellent as it allows us to totally concentrate on the CPD without distractions." – Melania Dickens, Forrester Dickens, attended Annual Tax Conference, 18th – 20th June 2025.

Quality, verifiable, flexible CPD
at affordable prices

Book and pay by 31 Jan to beat the price increase

SESCA Ltd

A subsidiary of CASE, the South Eastern
Society of Chartered Accountants Ltd

2b Chart House
Effingham Road
Reigate
Surrey
RH2 7JN

01737 223999

courses@sesca.co.uk
sesca.co.uk



SESCA