



**Insight
Training**
finance made simple

2025 Programme

www.insight-training.co.uk

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Contents

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Date	Course	Cost/delegate	Trainer	Time
04-Mar	<u>Charity Accounts and Audit - The Fundamentals</u>	£60	Richard Hemmings	9.30 - 12.30
07-Mar	<u>Charities Update</u>	£60	Peter Herbert & Maya Norbury	9.30 - 12.30
10-Mar	<u>Audit testing of Systems and Controls - What, When & How?</u>	£60	Peter Herbert	9.30 - 12.30
14-Mar	<u>Spring Tax Update</u>	£60	Malcolm Greenbaum	9.30 - 12.30
19-Mar	<u>Payroll Update</u>	£60	Rebecca Benneyworth	9.30 - 12.30
25-Mar	<u>Independent Examination of Charities</u>	£50	James Charlton	9.30 - 11.30
01-Apr	<u>Spring Financial Reporting Update</u>	£60	Peter Herbert	9.30 - 12.30
03-Apr	<u>Capital Allowances - The Fundamentals</u>	£60	Ros Martin	9.30 - 12.30
28-Apr	<u>Pension Scheme Accounts and Audit - The Fundamentals *</u>	£60	Peter Herbert & Maya Norbury	9.30 - 11.30
28-Apr	<u>Housing Association Accounts and Audit - The Fundamentals *</u>	£60	Peter Herbert & Maya Norbury	1.30 – 3.30
30-Apr	<u>Top Tips for an Efficient Audit</u>	£60	Jez Williams	9.30 - 12.30
01-May	<u>Acting for the Small Business</u>	£60	Ros Martin	9.30 - 12.30
07-May	<u>Accounting for and Auditing LLPs *</u>	£80	Jez Williams	9.30 - 12.30
12-May	<u>Spring Audit Update</u>	£60	John Selwood	9.30 - 12.30
13-May	<u>Pension Scheme Accounts and Audit Update *</u>	£60	Peter Herbert & Maya Norbury	9.30 - 11.30
13-May	<u>Housing Association Accounts and Audit Update *</u>	£60	Peter Herbert & Maya Norbury	1.30 – 3.30



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* Denotes specialist courses



Technical CPD

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* Denotes specialist courses

Date	Course	Cost/delegate	Trainer	Time
21-May	<u>Accounting for Groups *</u>	£80	James Charlton	9.30 - 12.30
03-Jun	<u>Company and Director Tax Issues</u>	£60	Rebecca Benneyworth	9.30 - 12.30
10-Jun	<u>VAT - The Fundamentals</u>	£60	Dean Wootten	9.30 - 12.30
17-Jun	<u>Practice Assurance Refresher and Update</u>	£60	Peter Herbert	9.30 - 12.30
18-Jun	<u>Auditing Groups (including ISA 600 revised) *</u>	£80	James Charlton	9.30 - 12.30
20-Jun	<u>Tax for Auditors</u>	£60	Malcolm Greenbaum	9.30 - 12.30
24-Jun	<u>Going Concern</u>	£40	Maya Norbury	9.30 - 11.00
24-Jun	<u>Auditing Creditors</u>	£40	Maya Norbury	11.30 - 1.00
25-Jun	<u>Accounting for & Auditing Construction Contracts *</u>	£80	James Charlton	9.30 - 12.30
26-Jun	<u>How to Become an Effective Audit Manager</u>	£60	Nicky Clough & Maya Norbury	9.30 - 12.30
02-Jul	<u>Academies & FE Colleges - Refresher and Update *</u>	£80	James Charlton	9.30 - 12.30
07-Oct	<u>Autumn Tax Update</u>	£60	Rebecca Benneyworth	1.30 - 4.30
08-Oct	<u>Fraud, Journals and Data Analytics</u>	£60	Jez Williams	9.30 - 12.30
09-Oct	<u>IFRS Comprehensive Refresher *</u>	£60	Clare Jones	9.30 - 11.30
13-Oct	<u>Autumn Financial Reporting Update</u>	£60	John Selwood	9.30 - 12.30
14-Oct	<u>Audit - All the Bits you Used to Know</u>	£60	Maya Norbury	9.30 - 12.30



Date	Course	Cost/delegate	Trainer	Time
21-Oct	<u>How to Audit a Charity</u>	£50	Richard Hemmings	9.30-11.30
22-Oct	<u>FRS 102 Periodic Review - Revenue</u>	£40	Peter Herbert	9.30 - 11.00
22-Oct	<u>Ethics for Accountants and Auditors</u>	£40	Peter Herbert	11.30 - 1.00
24-Oct	<u>Family Tax Planning</u>	£60	Malcolm Greenbaum	9.30 - 12.30
05-Nov	<u>Materiality, Sampling and Misstatements</u>	£40	Maya Norbury	9.30 - 11.00
05-Nov	<u>Auditing Stock</u>	£40	Maya Norbury	11.30 - 1.00
10-Nov	<u>MTD Update</u>	£60	Rebecca Benneyworth	9.30 - 12.30
11-Nov	<u>Autumn Audit Update</u>	£60	Peter Herbert	9.30 - 12.30
12-Nov	<u>Anti-Money Laundering Refresher and Update</u>	£60	Peter Herbert	9.30 - 12.30
18-Nov	<u>Financial Reporting & Tax Update</u>	£60	Peter Herbert & Ros Martin	9.30 - 12.30
20-Nov	<u>VAT Update</u>	£60	Dean Wootten	9.30 - 12.30
25-Nov	<u>Audit Compliance Principals' Regulatory Update *</u>	£80	Peter Herbert & Jez Williams	9.30 - 12.30
26-Nov	<u>Small and Micro Entity Accounting Issues</u>	£60	James Charlton	9.30 - 12.30
27-Nov	<u>FRS 102 Periodic Review - Leases</u>	£40	Jez Williams	9.30 - 11.00
27-Nov	<u>Accounting for and Auditing Financial Instruments</u>	£40	Jez Williams	11.30 - 1.00
02-Dec	<u>Property Taxes</u>	£60	Malcolm Greenbaum	9.30 - 12.30
03-Dec	<u>How to Become a Good New RI</u>	£60	Peter Herbert & Nicky Clough	9.30 - 12.30



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* Denotes specialist courses



CPD Bites

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* Denotes specialist courses

Date	Course	Cost/delegate	Trainer	Time
18-Mar	Effective Communication and Influencing Others	£30	Nicky Clough	1.00 - 2.00
25-Mar	IT Controls under ISA 315 - What you Really Need to Do	£30	James Charlton	12.30 - 1.30
29-Apr	Dealing with Difficult Situations and Conflict	£30	Nicky Clough	1.00 - 2.00
20-May	Effective Delegation and Coaching your Team	£30	Nicky Clough	1.00 - 2.00
12-Jun	Leading with Confidence: How to Develop your Leadership Skills	£30	Nicky Clough	1.00 - 2.00
24-Jun	Going Concern	£40	Maya Norbury	9.30 - 11.00
24-Jun	Auditing Creditors	£40	Maya Norbury	11.30 - 1.00
02-Oct	Maintaining Focus and Motivation	£30	Nicky Clough	1.00 - 2.00
09-Oct	IFRS Update *	£40	Clare Jones	11.45 - 12.45
21-Oct	Auditing Accounting Estimates	£30	Richard Hemmings	12.30-1.30
22-Oct	FRS 102 Periodic Review - Revenue	£40	Peter Herbert	9.30 - 11.00
22-Oct	Ethics for Accountants and Auditors	£40	Peter Herbert	11.30 - 1.00
05-Nov	Materiality, Sampling and Misstatements	£40	Maya Norbury	9.30 - 11.00
05-Nov	Auditing Stock	£40	Maya Norbury	11.30 - 1.00
13-Nov	Building Resilience and Managing Change	£30	Nicky Clough	1.00 - 2.00
27-Nov	FRS 102 Periodic Review - Leases	£40	Jez Williams	9.30 - 11.00
27-Nov	Accounting for and Auditing Financial Instruments	£40	Jez Williams	11.30 - 1.00
04-Dec	Effective Feedback and Appraisal	£30	Nicky Clough	1.00 - 2.00



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03-Apr	<u>Capital Allowances - The Fundamentals</u>	£60	Ros Martin	9.30 - 12.30
28-Apr	<u>Pension Scheme Accounts and Audit - The Fundamentals *</u>	£60	Peter Herbert & Maya Norbury	9.30 - 11.30
06-May	<u>How to Become an Effective Audit Junior</u>	£60	Maya Norbury	9.30 - 12.30
13-May	<u>Housing Association Accounts and Audit - The Fundamentals *</u>	£60	Peter Herbert & Maya Norbury	9.30 - 11.30
10-Jun	<u>VAT - The Fundamentals</u>	£60	Dean Wootten	9.30 - 12.30
11-Jun	<u>How to Become an Effective Audit Senior</u>	£60	Maya Norbury	9.30 - 12.30
26-Jun	<u>How to Become an Effective Audit Manager</u>	£60	Nicky Clough & Maya Norbury	9.30 - 12.30
02-Jul	<u>Academies & FE Colleges - Refresher and Update *</u>	£80	James Charlton	9.30 - 12.30
09-Oct	<u>IFRS Comprehensive Refresher *</u>	£60	Clare Jones	9.30 - 11.30
14-Oct	<u>Audit - All the Bits you Used to Know</u>	£60	Maya Norbury	9.30 - 12.30



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* Denotes specialist courses

“The presenter was brilliant - easy to follow and explained things very clearly.”



The Details

“Very well delivered and excellent practical points that were relevant for a practice of our size.”

Platform

All courses are run on the Zoom webinar platform with computer audio or dial in via phone options available.

Format

Course numbers are limited to ensure all participant questions are answered. We encourage questions in advance. Every effort is made to ensure sessions are engaging and interactive, through case studies, worked examples, discussion points, polls and Q&A.

Bookings

Bookings can be made directly on our website, or for block bookings across courses you can download our [booking form](#) and email it to enquiries@insight-training.co.uk.

Prices – 2024 prices have been frozen for 2025

Course prices per delegate are noted next to each course. We have kept our pricing consistent with 2024 and all delegates now have automatic access to our block booking discount.

Joining links and materials

Delegates will be emailed materials and a reminder of the joining link the day before each course.

Cancellations

Bookings are fully refundable up to 3 full working days before the course. Full terms and conditions can be found [on our website](#).

Privacy Policy

For details of our privacy policy, please see www.insight-training.co.uk/privacy-policy.



Technical in-house courses

We deliver in house training to accountants and finance professionals working both in professional practice and in industry and commerce.

[Contact us](#) for details

Financial Reporting

Sessions can cover UK GAAP, IFRS and not-for-profit.

Our financial reporting updates and refreshers help you to appreciate how commercial and operational issues affecting organisations are reflected in the annual report. We use clients' own financial statements and those of other companies in the same sector to bring issues to life.



Auditing

In house sessions can take the form of annual updates or practical workshops for all levels of the audit team.

Sessions focus on tackling audit problem areas often raised by an audit quality review or professional body inspection. Documentation requirements are often key, as is use of proprietary audit software in order to balance effectiveness and efficiency of effort.

Anti-Money Laundering

Bespoke sessions covering areas relevant to your firm.

This is a key area of CPD for all firms. We highlight and explain the important rules and key changes in an engaging, participative and understandable way. We look to include practical case studies relevant to your organisation to bring the content to life and make it easy to apply.





Audit File and Practice Assurance Reviews

and other specialist areas

[Contact us](#) for details

Cold file reviews

Onsite or remote, with full debrief, providing quality management and efficiency feedback

Hot file reviews

Where required by ethical standards or by a professional body or other regulator

Financial statement reviews

These can cover UK GAAP and IFRS – including not-for-profit

Practice Assurance

These focus on areas we know professional bodies look at during a compliance review

AML

These ensure that firm policies and procedures are fit for purpose – a key requirement for professional bodies

Specialist

Including Pension Schemes, DPB, ATOL and SRA





Professional skills

To be an effective modern finance professional takes more than technical skills. It means developing excellent interpersonal and soft skills, building self-awareness and self-management, and understanding your impact on others to give your clients the best level of service, support and advice, as well as growing your business.

[Contact us](#) for details

The Auditor Excellence Programme

Combining technical and professional skills, our series of small workshops provides participants with a range of practical tools enabling them to work effectively and efficiently at all stages of their audit career. Our popular 'how to become' workshops are targeted at audit juniors, audit seniors, audit managers and Responsible Individuals (RIs).

Business skills programmes

Our clients require their people to be effective communicators, presenters, leaders, managers and team-players. Successful firms need to develop their people so that they become confident business advisers, not just number crunchers. Workshops in this area help to develop a range of competencies for staff working at all levels within client organisations.

Coaching

Finding the time and space to work on yourself so you are able to effectively operate at a more senior level can be a tough challenge. You need to develop your ability to confidently manage and lead alongside your professional skills. Our accredited coaches will work with you, support you and challenge you in pursuit of achieving your goals, enhancing performance or improving work or personal situations.



Date	Accounting courses
04-Mar	Charity Accounts and Audit - The Fundamentals
07-Mar	Charities Update
25-Mar	Independent Examination of Charities
01-Apr	Spring Financial Reporting Update
28-Apr	Pension Scheme Accounts and Audit - The Fundamentals *
28-Apr	Housing Association Accounts and Audit - The Fundamentals *
07-May	Accounting for and Auditing LLPs *
13-May	Pension Scheme Accounts and Audit Update *
13-May	Housing Association Accounts and Audit Update *
21-May	Accounting for Groups *
25-Jun	Accounting for and Auditing Construction Contracts *
02-Jul	Academies & FE Colleges - Refresher and Update *
09-Oct	IFRS Comprehensive Refresher *
09-Oct	IFRS Update *
13-Oct	Autumn Financial Reporting Update
22-Oct	FRS 102 Periodic Review - Revenue
22-Oct	Ethics for Accountants and Auditors
18-Nov	Financial Reporting + Tax Update
26-Nov	Small and Micro Entity Accounting Issues
27-Nov	FRS 102 Periodic Review - Leases
27-Nov	Accounting for and Auditing Financial Instruments

Charity Accounts and Audit – The Fundamentals (3 hr)

This course will provide a detailed insight into the reporting framework for charities, including requirements for audit and independent examination, and the format and content of charity accounts. This course is ideal for accountants who are new to charities or need a refresher. Topics covered include:

- Charity regulatory and legal framework
- The format and content of charity accounts and how these differ from non-charities
- The Trustees' Annual Report
- Challenging areas including income recognition and fund accounting
- Charity specific disclosures - practical considerations
- Key considerations for auditors and independent examiners

4 Mar 9.30-12.30 (£60)



Charities Update (3 hr)

In what continues to be a challenging environment for many charities and their advisers, this course will provide a practical insight into current hot topics in financial reporting, independent examination and audit for charities. Topics covered will include:

- Latest developments in the Charities SORP, FRS 102 and the financial statements
- Considerations for the Trustees' Annual Report
- Challenging accounting areas for charities
- Important considerations for charity auditors
- Latest guidance from the Charity Commission

Independent Examination of Charities (2 hr)

Independent Examinations have continued to receive the attention of professional body inspectors over recent years, emphasising the importance of performing these examinations to a high standard. It can be a challenge to know exactly how much work (and documentation) is needed. This seminar will navigate through all the key requirements and focus on the balance between efficiency and effectiveness. Topics covered will include:

- Which charities qualify for independent examination and why
- The Charity Commission directions for independent examinations step by step
- How much testing to do - not too much; not too little
- Documentation requirements - what professional bodies expect to see on file
- Reporting Matters of Material Significance

  7 Mar 9.30-12.30 (£60)

25 Mar 9.30-11.30 (£50)

Spring Financial Reporting Update (3 hr)

The application of FRS 102 and FRS 105 continues to present companies and their advisors with many challenges, even more so taking into account the current challenging economic climate. This update will address all the topical issues and recent changes to the rules. Pipeline changes affecting SMEs and their accountants make this a crucial course to attend. Topics covered will include:

- Imminent changes to size limits - practical considerations
- Update on implementation of the Economic Crime and Corporate Transparency Act
- The FRS 102 periodic review - what firms need to be doing now in preparation
- Frequently asked questions on small and micro entity disclosures
- Common problem areas when applying FRS 102 and FRS 105 and how to tackle them

Pension Scheme Accounts and Audit – The Fundamentals (2 hr)

The financial reporting and auditing rules for pension schemes are different in many ways to those applying to other entities. This practical session will provide a step-by-step guide. Topics covered will include:

- Pension scheme regulatory framework
- Which schemes need an audit, and which don't
- Constructing the Fund Account and the Net Assets Statement
- Key audit tests and how to perform them
- What information really needs to go on the audit file



1 Apr 9.30-12.30 (£60)

28 Apr 9.30-11.30 (£60)

Housing Association Accounts and Audit – The Fundamentals (2 hr)

Preparing and auditing housing association accounts can be challenging. This seminar will provide a broad-based introduction to the format of the accounts and the underpinning regulations along with a detailed insight into the tests that should be performed when auditing housing associations. Topics covered will include:

- The rules that underpin housing association financial statements and audit
- The format of the accounts and detailed disclosure requirements
- Narrative reporting
- How 'normal' accounting rules differ for housing associations
- How to plan, perform and complete a housing association audit

Accounting for and Auditing LLPs (3 hr)

This seminar will navigate you through all the changes and highlight common problem areas faced by accountants and auditors acting for clients within this sector and how these are addressed. Topics covered will include:

- The changing face of the LLP SORP and what this means in practice for the accounts of small and micro-sized LLPs
- The form and content of financial statements for LLPs prepared in accordance with the SORP
- Constructing the members' interests table - worked examples and frequently asked questions
- Presenting and allocating losses in LLP financial statements
- LLPs and IFRS



28 Apr 1.30-3.30 (£60)

7 May 9.30-12.30 (£80)

Pension Scheme Accounts and Audit Update (2 hr)

This course seminar will focus 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). Topics covered will include:

- The Pensions SORP - key challenges and how these should be addressed
- Effective but efficient auditing of pension schemes
- What QAD expect to see on a pension scheme audit file
- The Pensions Regulator - recent Codes of Practice and other topical issues
- Key considerations when drafting the audit report

Housing Association Accounts and Audit Update (2 hr)

Housing Association accounts are challenging, with application of FRS 102, the Housing SORP and the Accounts Direction all mandatory. Also, although some of the audit work is standard, there are some peculiarities that firms working in this field need to be aware of. This session will highlight all the hot topics and provide a comprehensive update. Topics covered will include:

- 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



13 May 9.30-11.30 (£60)

13 May 1.30-3.30 (£60)

Accounting for Groups (3 hr)

The preparation of consolidated financial statements is a challenging task for accountants working in professional practice and industry. This seminar will provide a comprehensive refresher on the mechanics, and deal with a range of practical issues faced by accountants preparing group financial statements under UK GAAP. Topics covered include:

- Determining group status and when consolidated accounts are needed
- Refresher on essential consolidation principles
- Goodwill, disposals and other more complex considerations
- Group reorganisations - common scenarios and how to account for them
- How to account for associates and joint ventures

  **21 May 9.30-12.30 (£80)**

Accounting for and Auditing Construction Contracts (3 hr)

Accounting for construction contracts under FRS 102 can be very complex and nuanced, causing difficulties for accountants. Consequently, professional body inspectors and cold file reviewers regularly find that it is an area where audit improvements are required. This seminar will provide a greater understanding of how to navigate some of the accounting complexity and how auditors might approach this challenging area. Topics covered will include:

- Refresher of the basic accounting requirements under FRS 102
- Challenges in determining stage of completion and applying this
- Imminent changes to FRS 102 affecting construction contracts for periods commencing 1 January 2026
- Learning points from audit file reviews
- When might auditor's experts be needed?

25 Jun 9.30 – 12.30 (£80)

Academies and FE Colleges Refresher and Update (3 hr)

This seminar will provide a comprehensive refresher and update for those working in the education sector or acting for Academy or FE college clients. Challenging and new accounting rules will be explained in detail, as will important audit and regularity hot topics. Topics covered include:

- The legal and regulatory framework for academy schools and FE colleges
- Accounting fundamentals - what academy and FE college financial statements look like
- The Financial Handbooks - what they require and why they matter
- Key audit and regularity tests and how to perform them
- The latest Accounts Directions - key changes and their impact
- Current accounting problem areas for Academies and Colleges – and how to get them right
- ESFA feedback - examples of good and poor practice

IFRS Comprehensive Refresher (2 hr)

Many firms of accountants are asked to prepare and audit IFRS financial statements these days, but many have limited experience in this area. Our comprehensive session will bring you up to speed on all the important regulations and how they differ from UK GAAP. Topics covered will include:

- The framework for IFRS reporting
- Producing primary statements under IFRS
- Key differences and similarities compared to UK GAAP
- Important considerations when adopting IFRS for the first time
- Frequently required disclosure notes for SME businesses and where they go wrong
- Preparing accounts under FRS 101
- Key disclosure similarities and differences – IFRS v FRS 102



2 Jul 9.30 – 12.30 (£80)

9 Oct 9.30 – 11.30 (£60)

IFRS Update (1 hr)

Although the pace of change in IFRS has slowed in recent years, it is still crucial to stay on top of all the important regulations. This course will provide all the answers. Topics covered will include:

- Changes to accounting and disclosure rules for December 2025 year ends and onwards
- What are the IASB currently looking at - an insight into IASB Exposure drafts and projects
- New narrative reporting requirements, including the latest climate-related disclosures focus points
- Regulator feedback and what it means for IFRS preparers and FRS 101 accounts for qualifying SME businesses

Autumn Financial Reporting Update (3 hr)

The update will cover all the latest changes to UK GAAP, new FRC and ICAEW guidance, and news from Companies House. There will also be an overview of any relevant IFRS issues. This is a topical course, and its content will reflect that. The session will use practical examples and case studies, where relevant, and will cover:

- Recent and proposed changes to FRS 102 and FRS 105
- Focus on revenue recognition and the 5 step process
- Changes to other relevant accounting standards and SORPs
- Any relevant Exposure Drafts, including the consultation on the periodic review
- Companies House Reform
- The latest on narrative reporting
- The latest guidance from ICAEW

  9 Oct 11.45 – 12.45 (£40)

13 Oct 9.30 – 12.30 (£60)

FRS 102 Periodic Review – Revenue (90 mins)

2026 sees the implementation of the FRC's 'periodic review' with significant changes to rules on revenue aligning with IFRS 15 which affect companies applying FRS 102 and FRS 105. This course will explain the changes in detail and walk through the important steps required to ensure that companies comply with the new rules. Topics covered will include:

- The 5-step model - how it applies in practice
- Identifying and allocating revenue to performance obligations
- Dealing with variable consideration
- Transitional adjustments - worked examples
- Tax implications of the changes
- Important disclosure requirements
- How the changes impact micro-entities applying FRS 105

Ethics for Accountants and Auditors (90 mins)

Compliance with ethical frameworks and rules is ever more important for accountants and ICAEW CPD rules specifically require training in this area. This course will cover all the important requirements, with a particular focus on practical problems and how to resolve them. Topics covered will include:

- Background to professional ethics and the sources of ethical rules and guidance
- How the 'threats and safeguards' model works in practice
- An overview of the ICAEW Code of Ethics for accountants in practice
- Getting to grips with the FRC's Ethical Standard for Auditors
- Important 'red lines' for auditors - what can and can't be done
- Practical problem areas and how to resolve them



22 Oct 9.30-11.00 (£40)

22 Oct 11.30 – 1.00 (£40)

Financial Reporting & Tax Update (3 hr)

Tax and accounting interrelate lots and we get many questions about the important similarities and differences between the rules. This course will compare and contrast accounting and tax treatments in a range of different areas, providing an invaluable insight. Exact content will depend on what is topical at the time of the training but is likely to include:

- Important recent developments in corporate tax and how they affect accounts
- Hot topics - accounting issues currently on HMRC's radar
- Imminent changes to UK GAAP and their tax treatment
- Tax and accounts and tax in accounts - presenting the tax numbers in the financial statements
- Tangible and intangible assets - key similarities and differences between tax and accounts
- How loan arrangements are accounted for and how the tax rules differ
- Accounting for provisions and accruals - what is and isn't allowed for tax

Small and Micro Entity Accounting Issues (3 hr)

Although now well established, UK GAAP still presents a raft of challenges for small entities applying FRS 102 Section 1A and micro entities applying FRS 105. This seminar will help navigate through the practicalities and highlight imminent changes:

- Common recognition and measurement issues - and the different approaches under FRS 102 and FRS 105
- Section 1A disclosures - what's really needed to inform a true and fair view?
- The thorny issue of related party and directors' transactions
- FRS 105 - the top 10 most frequently asked questions
- Update on filing rules for small and micro entities under the Economic Crime Act
- Heads up on imminent changes to FRS 102 and FRS 105 for periods commencing 1 January 2026

  18 Nov 9.30 – 12.30 (£60)

26 Nov 9.30 – 12.30 (£60)

FRS 102 Periodic Review – Leases (90 mins)

One of two major changes to FRS 102 in the upcoming Periodic Review is a completely new chapter on leasing, based on IFRS 16 but with significant simplifications. Whilst the effective date for the revised Standard is some way off, early preparation will ensure that accountants and auditors are ready for transition. This short session will provide an overview of the new leasing regime (for lessees) and outline key strategies to transition successfully. Topics will include:

- The ‘on balance sheet’ approach - why it matters
- Exemptions for low-value and short leases, with examples
- How the transition process will work
- Options for members of IFRS groups
- Preparing for a smooth transition

Accounting for and Auditing Financial Instruments (90 mins)

Since the arrival of FRS 102 almost a decade ago, dealing with financial instruments has been a perennial source of technical queries and mistakes. Although financial instrument issues (such as hedge accounting) can be complex, even apparently straightforward loans and investments can be problematic in practice. This session will focus on the most common issues facing SME businesses and will highlight accounting and auditing issues with practical examples. Topics will include:

- Deciding whether financial instruments are ‘basic’ or ‘other’
- Accounting for loans - common pitfalls
- Classification of financial liabilities
- Debt versus equity (including convertible debt)
- Impairment issues



27 Nov 9.30 – 11.00 (£40)

27 Nov 11.30 – 1.00 (£40)

Date	Audit courses
10-Mar	<u>Audit testing of Systems and Controls - What, When & How?</u>
25-Mar	<u>IT Controls under ISA 315 - What you Really Need to Do</u>
30-Apr	<u>Top Tips for an Efficient Audit</u>
06-May	<u>How to Become an Effective Audit Junior</u>
12-May	<u>Spring Audit Update</u>
11-Jun	<u>How to Become an Effective Audit Senior</u>
18-Jun	<u>Auditing Groups (including ISA 600 revised) *</u>
24-Jun	<u>Going Concern</u>
24-Jun	<u>Auditing Creditors</u>
26-Jun	<u>How to Become an Effective Audit Manager</u>
08-Oct	<u>Fraud, Journals and Data Analytics</u>
14-Oct	<u>Audit - All the Bits you Used to Know</u>
21-Oct	<u>How to Audit a Charity</u>
21-Oct	<u>Auditing Accounting Estimates</u>
05-Nov	<u>Materiality, Sampling and Misstatements</u>
05-Nov	<u>Auditing Stock</u>
11-Nov	<u>Autumn Audit Update</u>
25-Nov	<u>Audit Compliance Principals' Regulatory Update *</u>
03-Dec	<u>How to Become a Good New RI</u>

Audit testing of Systems and Controls - What, When & How? (3 hr)

Systems and controls work is frequently performed and documented badly by audit firms, and this is an issue often picked up by cold file reviewers and professional bodies. Using example forms, this course will provide a practical insight into the minimum requirement and how to use tests of control to increase audit efficiency and effectiveness. Topics covered will include:

- Understanding control objectives and features and why they matter
- Minimum documentation requirements - what goes wrong and how to fix it
- Which controls to focus on
- New requirements on IT risks and controls and how they tie in
- Performing effective walkthroughs
- Tests of control - key benefits and pitfalls and what this entails in practice

10 Mar 9.30 – 12.30 (£60)



IT Controls under ISA 315 - What you Really Need to Do? (1 hr)

Since the introduction of revised ISA (UK) 315 for periods commencing after 15 December 2021, one of the most frequent challenges arising from cold file reviews has been how audit teams have addressed IT controls. This seminar will consider the all important question of how far auditors need to go in understanding and documenting IT controls. Topics covered will include:

- What ISA (UK) 315 actually says about IT controls
- Understanding IT-related risk and General IT Controls
- Do we have to test IT controls now?
- Getting the documentation right

Top Tips for an Efficient Audit (3 hr)

With the ever-increasing requirements being placed on auditors, and heightened scrutiny on the profession, it can sometimes feel impossible to carry out an audit that is both compliant and efficient. This challenge can be compounded by methodologies and software necessarily designed to cater for a broad range of audit clients. This session will concentrate on areas where a clear understanding of the requirements can help teams to focus on the aspects that really matter for a particular client and ensure that time is spent in the right areas. Specific areas covered include:

- Getting the most out of planning
- The role of the team discussion
- Risk assessment and links to the fieldwork
- Approaches to testing and gauging how much is enough
- Escaping the void at completion



25 Mar 12.30 – 1.30 (£30)

30 Apr 9.30 – 12.30 (£60)

How to Become an Effective Audit Junior (3 hr)

An audit junior is required to understand the fundamental principles of an audit and the relevant audit assertions. This seminar, targeted at those with up to two years' practical experience, will provide participants with a range of practical tools to develop their skills and competence in the field. Topics covered will include:

- Understanding the audit assertions and directional testing
- Documenting systems notes and performing walkthrough tests
- How to question, and listen, effectively when talking to client staff
- Important audit tests in key areas and how to tackle them
- Using analytical skills and common sense when carrying out audit work
- Documenting work and producing good quality working papers
- When and how to seek assistance from seniors, managers and partners

  **6 May 9.30 – 12.30 (£60)**

Spring Audit Update (3 hr)

There is a lot going on in auditing! In addition to changes to auditor independence and groups audits, the regulation of the audit profession is changing. Plus, there are the challenges of a post-COVID business world! How remote should auditors be? The session will use practical examples and will cover:

- Preparing for changes in group audits
- Other recent revisions to ISAs and guidance
- Changes to the FRC Ethical Standard for auditors
- Changes to Audit Regulation
- Application problems with ISA 600 (Revised) Group Audits
- Important proposed changes and exposure drafts
- Feedback from ICAEW and ACCA
- Issues arising from FRC disciplinary cases
- Audit reform
- Other topical issues from ICAEW Audit and Assurance Faculty

12 May 9.30 – 12.30 (£60)

How to Become an Effective Audit Senior (3 hr)

Audit seniors need to develop excellent analytical and personal skills, as well as having good technical knowledge. This seminar, aimed at those who are soon to take on, or have recently taken on, the in-charge role on audits, will provide participants with a range of practical tools enabling them to work effectively and efficiently in the audit field - and help develop their skills in managing audit juniors. Topics covered will include:

- Key planning considerations - including understanding the entity, materiality and preliminary analytical review
- Performing risk assessments and how it impacts on audit testing in the context of current market conditions
- Effective analytical procedures and key questioning skills
- Producing and critiquing evidence in more complicated areas of the audit
- Applying professional scepticism – how to question, and listen, effectively
- Reviewing the work of audit juniors, and managing and coaching them effectively

Auditing Groups (including ISA 600 revised) (3 hr)

The revisions to ISA (UK) 600 for periods commencing after 15 December 2023 bring into sharp focus the challenges that many auditors face when it comes to group audits. The revisions may affect the way in which even relatively simple group audits are conducted. This seminar will walk through the group audit process end to end, including highlighting where ISA (UK) 600 revisions will be most impactful. Topics covered will include:

- Reminder of group audit thresholds
- Key considerations when planning group audits
- Important do's and don'ts when relying on component auditors
- Practical considerations for component auditors
- Common documentation problem areas and how to tackle them



Going Concern (90 mins)

Going concern has always been a fundamental part of the audit but with turbulent economic conditions seemingly becoming the norm, and pressure on the profession to continually raise the bar, its importance has never been greater. This session will recap the requirements and use real life examples to explore best practice across a range of different circumstances. Topics covered will include:

- Respective responsibilities of management and auditors
- Key financial reporting requirements – and how they vary for different sizes of company
- Audit testing – minimum requirements
- Stress testing and dealing with uncertainty
- Evidencing professional scepticism when auditing going concern
- Audit documentation – important requirements and where it goes wrong
- Drafting the audit report – scenarios that auditors frequently encounter

Auditing Creditors (90 mins)

Gaining assurance over the completeness of an entity's liabilities is always an important objective of the audit and in some cases, it can be a key area of focus for stakeholders such as banks and other providers of finance. It's therefore important that auditors think carefully about their approach to testing in these areas. This session focuses on some of the common challenges that arise when auditing creditors as well as the common pitfalls and how to avoid them. Topics covered will include:

- Understanding the risks relevant to creditors – and developing the plan
- Sampling when testing creditors – key tips and traps
- Audit financing liabilities – important tests to perform
- Evaluating disclosure notes under FRS 102 for small and medium sized companies
- Producing good quality working papers – what file reviewers expect to see on file

  **24 Jun 9.30 – 11.00 (£40)**

24 Jun 11.30 – 1.00 (£40)

How to Become an Effective Audit Manager (3 hr)

Balancing the needs of clients, audit teams and RIs can make the role of audit manager a challenging one. This course will focus on the technical, people and project management skills needed to succeed in the role and use real life examples to identify practical solutions to help improve the quality and efficiency of the audits you manage. Topics covered include:

- Effective audit planning
- Challenging audit areas including accounting estimates and going concern
- Effective delegation and getting the best out of your team
- Managing clients, RIs and other stakeholders
- Completion and getting audits over the line

Fraud, Journals and Data Analytics (3 hr)

Regulators and file reviewers regularly note significant weaknesses in audit firms' approaches to fraud risk, including work on journals – despite increasing use of data analytics software to automate journals testing. This session will provide a refresher on key ISA (UK) 240 requirements with practical examples and tips for auditors. Specific topics covered include:

- What are auditors' responsibilities relating to fraud?
- The 'fraud triangle' and owner-managed businesses
- Demonstrating professional scepticism
- Fraud in revenue recognition
- Journals testing including practical tips for the use of data analytics



Audit - All the Bits you Used to Know (3 hr)

Effective compliance with auditing standards is a challenge for many firms but very important in view of the increasingly tough approach adopted by ICAEW and ACCA inspectors. This popular course will provide a file reviewer's perspective of all the things that have to be done when completing an SME audit and where audit documentation often goes wrong. Topics covered will include:

- Key do's and don'ts when identifying risks and setting materiality at the planning stage
- Considerations for determining an effective approach
- How to approach audit sampling and what to avoid
- Key audit tests – how to perform and document them efficiently and effectively
- How to approach the going concern and subsequent events reviews
- Common issues on audit cold file reviews and how to prevent them happening

How to Audit a Charity (2 hr)

Charities are fundamentally different from for-profit entities in terms of their income streams, their costs and the very reason they exist. These differences are reflected in charity accounts so it is no surprise that they can present different challenges to auditors. This session will focus on the key areas of the accounts where these differences arise and consider the different ways auditors might approach them, depending on the circumstances of the charity. Specific areas covered include:

- Trustees' Annual Report
- Funds
- Income
- Charity specific assets
- Additional disclosure requirements for charities

  14 Oct 9.30 – 12.30 (£60)

21 Oct 9.30-11.30 (£50)

Auditing Accounting Estimates (1 hr)

The implementation of ISA 540 Revised requires the auditor to effectively plan and robustly challenge management's assumptions, where relevant. This seminar will cover the audit requirements focusing on the planning and fieldwork, highlight common problem areas and explain what the auditor really needs to include on file.

Topics covered include:

- Identifying accounting estimates and considering the implications for the audit at the planning stage
- Assessing risk and understanding the inherent risk factors and control risk
- Identifying and auditing estimates that give rise to a significant risk – additional audit procedures required
- Professional scepticism – what, why and how?
- What audit tests to perform, including a stand back evaluation
- What professional bodies really expect to see on an audit file

Materiality, Sampling and Misstatements (90 mins)

This session will focus on the important considerations when setting materiality and applying sampling techniques. These areas often involve judgement on the part of the auditor and are therefore often challenging. Topics covered will include:

- Setting materiality and performance materiality – thresholds and percentages
- Key materiality documentation requirements
- Different approaches to sampling
- Setting and deviating from sample sizes – key do's and don'ts
- How to take credit for alternative procedures when performing tests of detail
- Assessing the impact of 'hard' and 'soft' errors when performing and completing an audit



Auditing Stock (90 mins)

Stock is often a material figure in both the profit and loss and the balance sheet and requires careful audit consideration. Auditors are required to verify the amount of stock held and consider its quality and condition in its valuation. This seminar will provide participants with an awareness of the audit risks associated with stock and responding to those risks with relevant audit procedures. Topics covered include:

- Key planning considerations - nature of stocks, audit risks at assertion level, methods of valuation, physical stock count
- Performing a risk assessment on the stock provisions and responding to those risk factors with relevant audit procedures
- Attendance at the stocktake and the required audit procedures
- Obtaining third party confirmations and testing the reliability of evidence
- Analytical review procedures and relationships with margins
- Common issues on audit cold file reviews and how to prevent them happening

  5 Nov 11.30-1.00 (£40)

Autumn Audit Update (3 hr)

There is lots changing in the world of audit. Firms have lots to think about getting to grips with changes effective for 2025 year-ends. There's also a plethora of feedback from professional bodies to take on board. We will highlight all the important changes in this area and what auditors need to do to comply. Subjects covered will include what is topical at the time of the course and are likely to include:

- ISA changes in 2025 – what they mean in practice
- Audit documentation – what regulators expect to see on file
- Common problem issues on files and how to address them
- ICAEW and FRC feedback on audit quality
- Update on recent changes to Audit Regulations
- Common ethical queries – and how to address them
- Audit data analytics and the use of Artificial Intelligence – what it is and how it can drive improvements in SME audits

11 Nov 9.30-12.30 (£60)

Audit Compliance Principals' Regulatory Update (3 hr)

These days QAD inspectors expect audit compliance principals (ACPs) to be increasingly hands-on when leading their teams. This seminar will explore all the important things ACPs must do order to ensure compliance with regulatory requirements whilst balancing crucial commercial consideration. Topics covered will include:

- Overview of recent high-profile audit 'scandals' and their significance for RIs
- Supporting staff, managers and other RIs - how to set the right 'tone from the top'
- The new quality management standards two years on – what ACPs really need to have done
- Key ethical challenges and how to address them in audit firms
- Horizon-scanning - important recent technical and regulatory changes and why they matter

How to Become a Good New RI (3 hr)

Making the transition from audit manager to responsible individual (RI) is a challenging one. A different set of competencies needs to be developed and the process needs to be handled carefully, both by the individual and the firm. This seminar highlights the practical steps to take to ensure that the progression is smooth and successful. It is crucial viewing for new and aspiring RIs - and those who manage them:

- The application process - key tips and traps
- Managing the transition - clients, mentoring, key checks and balances
- Key decisions required of RIs - and how to approach them
- What 'professional scepticism' means and where new RIs can fall short of the mark
- Areas of the audit where the RI needs to be hands-on – and what they need to document
- Managing the team effectively - not too much; not too little



Date	Regulatory courses
17-Jun	Practice Assurance Refresher and Update
12-Nov	Anti-Money Laundering Refresher and Update
On demand	AML E-Learning
On demand	Ethics E-Learning
On demand	GDPR E-Learning

Practice Assurance Refresher + Update (3 hr)

Accountants working in professional practice face a seemingly endless stream of regulatory changes which affect practice management. This seminar will explain all the important issues and changes. The session is aimed at all accountants in practice. Topics covered will include:

- AML procedures reviewed during Practice Assurance visits and why they matter
- Latest guidance on engagement letters and PI cover
- GDPR - what ICAEW/ACCA and the ICO really expect you to do to comply
- Top tips for managing risk in your practice
- Handling client money - key do's and don'ts
- Recent regulator feedback on Practice Assurance compliance – what the disciplinary cases tell us

Anti-Money Laundering Refresher and Update (3 hr)

This course will provide a broad-based refresher on the Anti-Money Laundering regime and remind participants of their obligations. It will provide an insight into common issues that firms face when applying the regulations and how they should tackle them. Exact content will depend on what is topical at the time of the training but is likely to include:

- Update on implementation of the Economic Crime and Corporate Transparency Act
- Recent updates to the CCAB guidance - practical implications
- Top tips on conducting efficient and effective client due diligence
- 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
- Recent feedback from professional bodies and what it means in practice
- AML regulation - the future direction of travel

  **17 Jun 9.30-12.30 (£60)**

12 Nov 9.30-12.30 (£60)

Anti-Money Laundering – Comprehensive E-Learning Programme

Compliance with the Anti-Money Laundering regime is mandatory for all staff in all firms of accountants, including subcontractors. To help Money Laundering Reporting Officers comply with their obligations in this area – and protect them and their staff – Insight Training has produced a suite of webinars with supporting materials and assessments. Split down by topic area, and by staff level, each module lasts 15-30 minutes and has self-check quizzes throughout, with a multiple-choice assessment at the end of the series to evidence successful completion.

The series includes separate modules for:

- New starters
- Client due diligence
- Reporting obligation
- Other legislation
- Recent updates
- Non-client facing staff

  [For full details and prices, please visit our website](#)

Ethics E-Learning

All ICAEW members are required to complete annual Ethics training. Insight Training has produced a one-hour, on demand webinar designed to deal with this requirement whilst promoting thought and discussion within firms about different scenarios that accountants may face. Taking you through the fundamentals of the ethical principles for accountants, common client issues and greater risk areas to watch out for, the session is suitable for the whole team.

Available from 1 Feb 2025

GDPR E-Learning

Our 30-minute, on demand webinar covers the basics of GDPR legislation, key terms and principles, data subject rights and common issues facing accountants in practice. With frequently asked questions and top tips, this session provides the basics for new starters or a refresher for the whole team.

Available from 1 Feb 2025

Date	Skills courses
18-Mar	Effective Communication and Influencing Others
29-Apr	Dealing with Difficult Situations and Conflict
20-May	Effective Delegation and Coaching your Team
12-Jun	Leading with Confidence: How to Develop your Leadership Skills
02-Oct	Maintaining Focus and Motivation
13-Nov	Building Resilience and Managing Change
04-Dec	Effective Feedback and Appraisal

Effective Communication and Influencing Others (1 hr)

Developing your key communication skills helps you to deliver clearly and effectively and allows you to positively influence others.

- How we communicate, in person and in writing, and how to choose the most appropriate medium
- Key influencing skills – enhancing your reputation and building your personal brand
- How to create the right impression when communicating remotely
- Being aware of your digital body language

18 Mar 1.00-2.00 (£30)

Dealing with Difficult Situations and Conflict (1 hr)

Conflict and disagreement often feels uncomfortable, and many seek to avoid it. This can result in a lack of challenge, hindering open discussion and the development of professional scepticism.

- What conflict is and different ways people respond to it
- The benefits of embracing challenge in a professional environment
- What inhibits individuals in assertively dealing with difficult situations and what to do about it
- How to handle common difficult situations and conflicts.

29 Apr 1.00-2.00 (£30)

Effective Delegation and Coaching your Team (1 hr)

Learning how to delegate well is essential for you to be able to accomplish more and provides an essential learning opportunity for your team. Honing your coaching skills will help you make the most of those opportunities.

- What should be delegated and why
- How to delegate well – five key steps
- The benefits of coaching
- How to develop an authentic and effective coaching style

20 May 1.00-2.00 (£30)

Maintaining Focus and Motivation (1 hr)

Focus and motivation are vital elements of personal effectiveness. Remaining motivated and focussed on your goals throughout the day not only saves time but also stress!

- The importance of setting goals and objectives
- What motivation is and who is responsible for it
- How to sharpen your focus and achieve a sense of flow
- Dealing with distractions and anxiety
- Practical tips and neuroscience hacks

2 Oct 1.00-2.00 (£30)

Leading with Confidence: How to Develop your Leadership Skills (1 hr)

What does it mean to be a leader? How can you develop your skills to be more effective in a leadership role.

- What leadership is and how it differs from management
- How to identify your leadership style and how you can develop and flex it
- How to communicate effectively as a leader
- Different leadership strategies for building and leading effective teams

12 Jun 1.00-2.00 (£30)



Building Resilience and Managing Change (1 hr)

Change is an inevitable feature of modern business life. Building resilience will help you to adapt and bounce back from adversity and deal with change effectively.

- Understanding the concept of resilience and its importance in managing change
- Strategies for building resilience and coping with stress
- Managing and leading change
- Communicating change effectively to stakeholders

13 Nov 1.00-2.00 (£30)

Effective Feedback and Appraisal (1 hr)

Giving and receiving effective feedback is essential for people development. So often appraisals are seen as an administrative necessity rather than as an opportunity for development and motivation.

- Why developing, not just managing your people is important and where feedback fits in
- Delivering effective and useful feedback that can be acted upon
- Conducting an effective appraisal and development review

4 Dec 1.00-2.00 (£30)



Spring Tax Update (3 hr)

Date	Tax courses
14-Mar	Spring Tax Update
19-Mar	Payroll Update
03-Apr	Capital Allowances - The Fundamentals
01-May	Acting for the Small Business
03-Jun	Company and Director Tax Issues
10-Jun	VAT - The Fundamentals
20-Jun	Tax for Auditors
07-Oct	Autumn Tax Update
24-Oct	Family Tax Planning
10-Nov	MTD Update
20-Nov	VAT Update
02-Dec	Property Taxes

This session will cover developments in various taxes in the previous six months. This includes new legislation and case law developments as well as topic reviews of areas that practitioners commonly encounter with issues that may not have been considered previously.

We will cover aspects of the following areas with the aim to consider practical issues of relevance:

- Personal taxes
- Capital taxes
- Business taxes
- VAT



Payroll Update (3 hr)

This course provides an update on changes in payroll taxes and the administration of payroll for the 2024/25 and 2025/26 tax years and will highlight advice currently relevant to smaller businesses and in particular owner managed companies. This session will also cover:

- Changes in tax and NIC for the new tax year; reviewing in-year changes; new processes to implement
- Minimum wage rates; update on compliance issues
- Changes to the taxation of benefits in kind, P11D issues to watch for this year
- Plans for payroll benefits in kind – how to prepare
- Any other relevant issues developing

Capital Allowances – The Fundamentals (3 hr)

This session is designed for accountants needing a refresher on capital allowances. It will cover all aspects of the topic which often causes issues with advisers. Topics covered will include (subject to any recent announcements):

- Capital v revenue: are we thinking about capital allowances at all, or can we claim a deduction for the costs?
- The definition of plant and machinery: including a review of recent case law
- Computational issues to include grant funded assets and first year allowances/annual investment allowances
- Plant and machinery in buildings: Integral features and the process of sale including interaction with s198 claims
- Structures and buildings allowance
- Interaction with CGT

  19 Mar 9.30-12.30 (£60)

3 Apr 9.30-12.30 (£60)

Acting for the Small Business (3 hr)

This session will provide a comprehensive guide to acting for small businesses and will include common issues for advisers. Topics covered include (subject to any relevant announcements):

- The structure of the business: sole traders, partnership and companies
- Computational issues for small businesses: what kind of challenges do we see?
- Capital assets planning to include capital allowances, holding vehicles for property
- Personal service companies: do they still work?
- Construction industry scheme
- Employment issues relevant to small businesses

Company and Director Tax Issues (3 hr)

This highly practical session will cover taxation of small businesses and their owners, and current hot topics for the smaller practice. The session will include a wide range of topics, including;

- Corporation tax for small companies, including tax planning ideas
- Research and development tax relief
- Tax efficient extraction of profits for the owner manager
- Director loan accounts – topical issues and how best to manage this area
- Current developments on employment taxes and benefits in kind
- Autumn Budget 2024 – a roundup of the changes
- Tax planning for the smaller business – incorporation and other ideas



VAT - The Fundamentals (3 hr)

This course will cover VAT areas that practitioners commonly encounter when dealing with owner managed clients. The course is aimed at partners, managers and seniors who deal with OMBs in their daily work. Topics covered will include:

- Registration issues – UK and overseas
- Common output tax liability errors
- Input tax recovery on directors, staff and freelancers' costs
- Business entertainment and subsistence issues
- Business gifts – when we can and cannot recover VAT
- Impact of private use
- Partial exemption
- Invoicing issues – sales and purchases
- Dealing with international transactions correctly
- Small business schemes
- Reporting issues
- Disclosing errors
- Minimising VAT penalties

Tax for Auditors (3 hr)

This course will discuss both developments and recurring issues affecting companies' corporation tax and other tax liabilities.

The developments will be based on recent or proposed legislation. The recurring issues are likely to include VAT issues, employment tax issues and the application of IR35 (and off-payroll working rules) to clients as customers for these supplies.

  10 Jun 9.30-12.30 (£60)

20 Jun 9.30-12.30 (£60)

Autumn Tax Update (3 hr)

Please note the afternoon timing of this course. This course will update participants on developments in tax relevant to the general practitioner over the previous 6 – 12 months. The update will cover the Finance Act and announcements by HMRC which are relevant to personal and business tax clients. The content will cover the following tax areas:

- Corporation and business tax
- Personal income tax including savings measures, and devolved income tax
- Capital taxes
- VAT
- Tax administration

Family Tax Planning (3 hr)

This session will discuss the tax implications of marriage, separation and divorce. It will also cover anti-avoidance provisions relating to gifts to minor children and how families can plan their affairs to minimise exposure to capital gains tax and inheritance tax when passing wealth to younger generations.

It will cover tax-efficient investment strategies for parents and other family members to provide for funds for young family members when they reach 18 or older, and how trusts might be used to both mitigate tax, and also protect capital, while the income benefits young or disabled family members.



MTD Update (3 hr)

This session will bring you bang up to date with developments in MTD for Income Tax and will support you to prepare your practice and your clients. It will cover:

- Digital record keeping - what is the minimum requirement? Digital links - when are they needed?
- Quarterly reporting - what, when, how?
- Finalising the tax year - what does this mean?
- Feedback from agents and HMRC on progress of Beta testing
- Landlords and joint ownership - what will be required?
- Digital exclusion - what are the rules and when to act on this

VAT Update (3 hr)

This course will cover recent case law and HMRC announcements affecting practitioners and their owner managed clients. The course is aimed at partners, managers and accounting staff who deal with owner managed clients in their daily work. Topics covered will include:

- Common output tax liability errors
- Land and property
- International supplies
- Inputs
- Administration and penalties

  10 Nov 9.30-12.30 (£60)

20 Nov 9.30-12.30 (£60)

Property Taxes (3 hr)

This course will examine all the taxes that can be relevant to clients when buying, selling and generating income from properties. Jointly owned properties, both between married couples and unmarried co-owners will be covered, as will the tax implications of incorporating a property investment business. Topics covered will include:

- Income tax
- Corporation tax
- Capital gains tax
- Inheritance tax
- VAT
- SDLT and the Annual Tax on Enveloped Dwellings





Clare Jones has a professional practice background and is an experienced trainer, specialising in IFRS, UK GAAP and auditing. Clare has delivered numerous courses around the world and leads on IFRS programmes for Insight Training.



Dean Wooten has been a tax trainer for many years and lectures on a wide variety of tax matters, focusing on the practical aspects of the issues presented. He qualified with Grant Thornton, then gained experience in a variety of large and mid-tier firms before qualifying as an Associate of the Institute of Taxation.



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.



Jez Williams is a director at Apex. Jez spent over two decades as a CPD lecturer in accounting, financial reporting and auditing with a particular specialism in FCA CASS audits. A board member of the ICAEW Audit and Assurance Faculty and a frequent presenter on the CPD circuit, Jez is well known for his engaging, practical approach to CPD training.





John Selwood is a chartered accountant and independent training consultant who speaks on financial reporting, auditing, anti-money laundering and company law. Previously the technical partner for a top 30 firm of accountants and head of an accountancy network, John is a member of ICAEW's Audit and Assurance Faculty's Practitioner Services Panel.



Malcolm Greenbaum is a chartered accountant and chartered tax advisor who provides consultancy and training services to companies and accountancy firms worldwide. He has particular experience in delivering bespoke IFRS and US GAAP programmes as well as UK tax and VAT training. His style is enthusiastic and encourages discussion of practical issues.



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.



Nicky Clough trained with KPMG and is a founding director of Insight Training. She specialises in the development and delivery of commercial and financial awareness training and business skills coaching and is experienced in the design and facilitation of management development programmes.





Peter Herbert is a founding director of Insight Training. Having trained with KPMG, he has over 20 years' training and audit file review experience. He specialises in financial reporting, auditing, charities and company law, providing practical insights and pragmatic advice. He also heads up our file review team.



Rebecca Benneyworth has worked for many years as a lecturer with a particular practical slant on topics. She is past chair of the ICAEW Tax Faculty, a member of ICAEW Council and volunteers on a number of boards, helping smaller businesses and their advisers. She has her own practice in Gloucestershire, consisting of small businesses and personal tax clients.

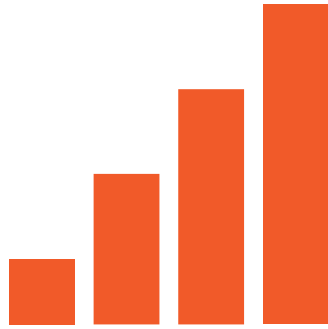


Richard Hemmings has many years' experience in technical and training roles in both large and medium sized accountancy practices, most recently Macintyre Hudson (MHA) and BDO. He specialises in financial reporting, auditing and charities.



Ros Martin started her career in tax with the Inland Revenue but left in 2000 to pursue a career in consultancy and training. She set up her own business in 2004 and now spends her time lecturing on all aspects of tax and advising accountancy firms on tax planning and compliance for their clients.





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Insight Training provides financial & commercial awareness training, financial technical training in UK GAAP, IFRS and audit & assurance, anti-money laundering and practice regulation training, alongside business skills courses throughout the UK.

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