



**Insight
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2026 CPD Programme

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Contents

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Date	Course	Cost/delegate	Trainer	Time
03-Mar	<u>Charity Accounts and Audit - The Fundamentals</u>	£63	Maya Norbury	9.30 - 12.30
10-Mar	<u>Planning an ISA Compliant Audit</u>	£63	James Charlton	9.30 - 12.30
12-Mar	<u>Payroll Update</u>	£63	Jo Marshall	9.30 - 12.30
17-Mar	<u>Charities Update</u>	£63	James Charlton	9.30 - 12.30
20-Mar	<u>Spring Tax Update</u>	£63	Malcolm Greenbaum	9.30 - 12.30
23-Mar	<u>Independent Examination of Charities</u>	£53	Richard Hemmings	9.30 - 11.30
24-Mar	<u>Pension Scheme Accounts and Audit - The Fundamentals</u>	£63	Maya Norbury	9.30 - 11.30
24-Mar	<u>Housing Association Accounts and Audit - The Fundamentals</u>	£63	Maya Norbury	1.30 - 3.30
14-Apr	<u>Spring Financial Reporting Update</u>	£63	Peter Herbert	9.30 - 12.30
20-Apr	<u>Pension Scheme Accounts and Audit Update</u>	£63	Peter Herbert & Maya Norbury	9.30 - 11.30
20-Apr	<u>Housing Association Accounts and Audit Update</u>	£63	Peter Herbert & Maya Norbury	1.30 - 3.30
21-Apr	<u>Audit - All the Bits you Used to Know</u>	£63	Richard Hemmings	9.30 - 12.30
23-Apr	<u>Incorporation, Disincorporation and Other Tax Planning</u>	£63	Ros Martin	9.30 - 12.30
28-Apr	<u>Capital Gains Tax – The Fundamentals</u>	£63	Karen Speight	9.30 - 12.30
30-Apr	<u>Accounting for Groups</u>	£84	Jez Williams	9.30 - 12.30
05-May	<u>How to Become an Effective Audit Junior</u>	£63	Maya Norbury	9.30 - 12.30

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Date	Course	Cost/delegate	Trainer	Time
06-May	FRS 102 Periodic Review Transition Workshop	£63	Peter Herbert	9.30 - 12.30
11-May	Spring Audit Update	£63	John Selwood	9.30 - 12.30
19-May	Accounting and Tax – Directors' Transactions & RPTs	£84	Richard Hemmings & Ros Martin	9.30 - 12.30
21-May	FRS 105 Periodic Review Transition Workshop	£63	Peter Herbert	9.30 - 12.30
02-Jun	Company Secretarial Refresher and Update	£63	Peter Herbert	9.30 - 12.30
03-Jun	VAT Common Errors	£63	Dean Wootten	9.30 - 12.30
04-Jun	Audit Compliance Principals' Regulatory Update	£84	Peter Herbert & Jez Williams	9.30 - 12.30
09-Jun	How to Become an Effective Audit Senior	£63	Gill Barron	9.30 - 12.30
12-Jun	General Practitioners' Tax Workshop	£63	Rebecca Benneyworth	9.30 - 12.30
17-Jun	Practice Assurance Refresher and Update	£84	Peter Herbert & Karen Eckstein	9.30 - 12.30
18-Jun	Top Tips for an Efficient Audit	£63	Richard Hemmings	9.30 - 12.30
23-Jun	Tax Issues of Buying and Selling Businesses	£63	Karen Speight	9.30 - 12.30
24-Jun	Auditing Groups	£84	Jez Williams	9.30 - 12.30
26-Jun	How to Become an Effective Audit Manager	£63	Gill Barron	9.30 - 12.30
30-Jun	Accounting for and Auditing Construction Contracts	£84	James Charlton	9.30 - 12.30
07-Jul	Academy Accounts and Audit - The Fundamentals	£84	James Charlton	9.30 - 12.30



Date	Course	Cost/delegate	Trainer	Time
08-Jul	<u>Academies Update</u>	£84	James Charlton	9.30 - 12.30
15-Sep	<u>Introduction to Audit - part 1</u>	£63	Gill Barron	9.30 - 12.30
22-Sep	<u>Introduction to Audit - part 2</u>	£63	Gill Barron	9.30 - 12.30
29-Sep	<u>ISQM 1, Quality Reviews and RCA: All you Need to Know</u>	£84	Peter Herbert & Edward Rands	9.30 - 12.30
01-Oct	<u>Data Analytics and AI</u>	£84	Peter Herbert & John Toon	9.30 - 12.30
05-Oct	<u>Autumn Financial Reporting Update</u>	£63	John Selwood	9.30 - 12.30
07-Oct	<u>Fraud and Scepticism</u>	£63	Jez Williams	9.30 - 12.30
13-Oct	<u>A - Z of Charity Accounts</u>	£53	Richard Hemmings	9.30 - 11.30
14-Oct	<u>IFRS Comprehensive Refresher</u>	£63	Clare Jones	9.30 - 11.30
14-Oct	<u>IFRS Update</u>	£42	Clare Jones	11.45 – 12.45
16-Oct	<u>Capital Taxes</u>	£63	Karen Speight	9.30 - 12.30
20-Oct	<u>Autumn Tax Update</u>	£63	Rebecca Benneyworth	9.30 - 12.30
21-Oct	<u>Ethics for Accountants and Auditors</u>	£53	Peter Herbert	9.30 - 11.30
04-Nov	<u>MTD Update</u>	£63	Rebecca Benneyworth	9.30 - 12.30
05-Nov	<u>Autumn Audit Update</u>	£63	Peter Herbert	9.30 - 12.30
09-Nov	<u>How to Close Down an Audit</u>	£53	Richard Hemmings	9.30 - 11.30

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Technical CPD

Date	Course	Cost/delegate	Trainer	Time
10-Nov	<u>VAT Update</u>	£63	Dean Wootten	9.30 - 12.30
12-Nov	<u>Anti-Money Laundering Refresher and Update</u>	£63	Peter Herbert	9.30 - 12.30
17-Nov	<u>Financial Reporting + Tax Update</u>	£84	Peter Herbert & Ros Martin	9.30 - 12.30
23-Nov	<u>Tax Planning from Cradle to Grave</u>	£63	Ros Martin	9.30 - 12.30
24-Nov	<u>Small and Micro Entity Accounting Issues</u>	£63	James Charlton	9.30 - 12.30
01-Dec	<u>Property Accounting Issues</u>	£63	Peter Herbert	9.30 - 12.30
02-Dec	<u>Autumn Budget Update</u>	£63	Malcolm Greenbaum	9.30 - 12.30
03-Dec	<u>What Makes a Good New RI</u>	£84	Peter Herbert & Nicky Clough	9.30 - 12.30

CPD Bites

Date	Course	Cost/delegate	Trainer	Time
23-Mar	<u>Journals testing</u>	£32	Richard Hemmings	12.30 - 1.30
15-Apr	<u>Analytical Review</u>	£42	Maya Norbury	9.30 - 11.00
15-Apr	<u>Auditing Revenue</u>	£42	Maya Norbury	11.30 - 1.00
13-Oct	<u>Top 5 File Review Issues</u>	£32	Richard Hemmings	12.30 - 1.30
14-Oct	<u>IFRS Update</u>	£42	Clare Jones	11.45 - 12.45
21-Oct	<u>Auditing Wages and Salaries</u>	£32	Peter Herbert	12.30 - 1.30
09-Nov	<u>Materiality and Sampling</u>	£32	Richard Hemmings	12.30 - 1.30



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24-Mar	<u>Pension Scheme Accounts and Audit - The Fundamentals</u>	£63	Maya Norbury	9.30 - 11.30
24-Mar	<u>Housing Association Accounts and Audit - The Fundamentals</u>	£63	Maya Norbury	1.30 - 3.30
21-Apr	<u>Audit - All the Bits you Used to Know</u>	£63	Richard Hemmings	9.30 - 12.30
28-Apr	<u>Capital Gains Tax – The Fundamentals</u>	£63	Malcolm Greenbaum	9.30 - 12.30
05-May	<u>How to Become an Effective Audit Junior</u>	£63	Maya Norbury	9.30 - 12.30
09-Jun	<u>How to Become an Effective Audit Senior</u>	£63	Gill Barron	9.30 - 12.30
26-June	<u>How to Become an Effective Audit Manager</u>	£63	Gill Barron	9.30 - 12.30
07-Jul	<u>Academy Accounts and Audit - The Fundamentals</u>	£84	James Charlton	9.30 - 12.30
15-Sep	<u>Introduction to Audit - part 1</u>	£63	Gill Barron	9.30 - 12.30
22-Sep	<u>Introduction to Audit - part 2</u>	£63	Gill Barron	9.30 - 12.30
14-Oct	<u>IFRS Comprehensive Refresher</u>	£63	Clare Jones	9.30 - 11.30

The Fundamentals Series

Please visit our website to download our [Booking Form](#)

“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. Recordings are available for all courses if you cannot attend live.

Bookings and prices

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

Prices per delegate are noted next to each course.

Joining links and materials

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

Customer portal and certificates

You can access your customer portal from our [website](#) to view your upcoming bookings, course history, certificates and any e-Learning products. Delegates will be emailed a certificate of attendance automatically when attending live.

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 in both professional practice and 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 problem audit areas often raised by an audit quality review or professional body inspection. Documentation requirements are commonly 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, Housing Associations, 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 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
03-Mar	Charity Accounts and Audit - The Fundamentals
17-Mar	Charities Update
23-Mar	Independent Examination of Charities
24-Mar	Pension Scheme Accounts and Audit - The Fundamentals
24-Mar	Housing Association Accounts and Audit - The Fundamentals
14-Apr	Spring Financial Reporting Update
20-Apr	Pension Scheme Accounts and Audit Update
20-Apr	Housing Association Accounts and Audit Update
30-Apr	Accounting for Groups
06-May	FRS 102 Periodic Review Transition Workshop
19-May	Accounting and Tax – Directors' Transactions and RPTs
21-May	FRS 105 Periodic Review Transition Workshop
30-Jun	Accounting for and Auditing Construction Contracts
07-Jul	Academy Accounts and Audit - The Fundamentals
08-Jul	Academies Update
05-Oct	Autumn Financial Reporting Update
13-Oct	A – Z of Charity Accounts
14-Oct	IFRS Comprehensive Refresher
14-Oct	IFRS Update
21-Oct	Ethics for Accountants and Auditors
17-Nov	Financial Reporting + Tax Update
24-Nov	Small and Micro Entity Accounting Issues
01-Dec	Property Accounting Issues

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 will 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



3 Mar 9.30-12.30 (£63)

Charities Update (3 hr)

The charity accounting and auditor environment is evolving, and keeping up with the changes can be a challenge for both 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

  17 Mar 9.30-12.30 (£63)

23 Mar 9.30-11.30 (£53)

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
- Understanding the accounting and reporting requirements
- Key audit tests for pension schemes and how to perform them

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



24 Mar 9.30-11.30 (£63)

24 Mar 1.30-3.30 (£63)

Spring Financial Reporting Update (3 hr)

The application of FRS 102 and FRS 105 continue to present companies and their advisors with many challenges, and with major changes around the corner there is a lot to stay abreast of. This update will address all the topical issues and recent changes to the rules. Exact content will depend on what is topical at the time of the training but is likely to 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 Update (2 hr)

This course 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
- Impact of the revised SORP effective from periods commencing 1 January 2026
- 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

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:

- Tricky accounting areas – and how to get them right
- Impact of the revised SORP effective from periods commencing 1 January 2026
- 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

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 will 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
- Changes brought about by the FRS 102 'periodic review'



FRS 102 Periodic Review Transition Workshop (3 hr)

The FRC's 'periodic review' of FRS 102 takes effect from periods commencing 1 January 2026 and, as when FRS 102 was first introduced, the transition will require careful consideration. This course will use a comprehensive case study to take you through all the important steps. Topics covered will include:

- Recap on key changes on leasing and revenue recognition
- Options and requirements on transition – including relevant journals
- Other changes to consider
- Key disclosure requirements and how they differ from the current standard
- What the transition means for small entities applying FRS 102 Section 1A

Accounting and Tax – Directors' Transactions and RPTs (3 hr)

Directors' and related party transactions are a challenging area for accountants and auditors. There are important legal requirements concerning which transactions are allowed – and which require disclosure. This seminar will high all the important rules and how to ensure compliance.

- Legality – which directors' transactions require approval, and which simply aren't allowed
- Illegal dividends – key legal and disclosure considerations and tax implications of such payments
- Related party definitions in FRS 102 – who's related to who and is this the same as for tax purposes?
- Disclosure rules for micro, small and larger entities
- Pipeline changes – the likely impact of the periodic review of FRS 102
- The tax angle on remuneration strategy for directors and other common transactions
- Compliance issues for directors including transfer of corporate liabilities

  6 May 9.30-12.30 (£63)

19 May 9.30 – 12.30 (£84)

FRS 105 Periodic Review Transition Workshop (3 hr)

The FRC's 'periodic review' of FRS 105 takes effect from periods commencing 1 January 2026 and, as when FRS 105 was first introduced, the transition will require careful consideration. This course will use a comprehensive case study to take you through the important steps. Topics covered will include:

- Recap on key periodic review changes and how they impact on micro entities
- Eligibility for FRS 105, and pros & cons of implementation
- The impact of new company legislation on size thresholds
- Options and requirements on transition – including relevant journals
- Key disclosure requirements and how they differ from FRS 102
- Other micro entity hot topics and what they mean in practice

Accounting for and Auditing Construction Contracts (3 hr)

Accounting for construction contracts under FRS 102 can be very complex and nuanced, even more so in light of updates to FRS 102. 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:

- Impact on construction contract accounting of FRS 102 revisions, for periods commencing 1 January 2026.
- Challenges in applying the new 5-step revenue recognition model, including determining stage of completion
- Learning points from audit file reviews
- When might auditor's experts be needed?



21 May 9.30 – 12.30 (£63)

30 Jun 9.30 – 12.30 (£84)

Academy Accounts and Audit – The Fundamentals (3hr)

This seminar will provide a comprehensive beginner's guide to academy financial statements, the Academy Trust Handbook and the Academies Accounts Direction, including some of the key audit and regularity tests that are needed. Topics covered include:

- The legal and regulatory framework for academy schools
- Accounting fundamentals – what academy financial statements look like
- The Academies Trust Handbook – what it requires and why it matters
- Key audit and regularity tests and how to perform them

Academies Update (3 hr)

This popular seminar is essential for any accountant or auditor acting for academy schools. Recent updates to the Academies Accounts Direction and Academy Trust Handbook will be covered in depth, along with current issues in academies accounting. Topics covered will include:

- The latest Academies Accounts Direction – key changes and their impact
- Updates to the Academy Trust Handbook
- Current accounting problem areas for Academies – and how to get them right
- DfE feedback for Academies and their auditors



7 Jul 9.30-12.30 (£84)

8 Jul 9.30 – 12.30 (£84)

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:

- Changes to FRS 102 and FRS 105
- Focus on practical problems with lease accounting and revenue recognition
- 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

A-Z of Charity Accounts (2 hr)

During charities courses and file reviews we get lots of questions about presentation and disclosure and how to get it right. This session will focus on the most common areas of concern and how to ensure that disclosures are spot on. Topics covered will be:

- Disclosure of transactions with trustees
- Other related party and remuneration disclosures
- Key disclosures for grant giving charities
- Funds analysis notes – tips and traps
- Key differences for smaller and larger charities
- Changes in the Charities SORP 2026



5 Oct 9.30-12.30 (£63)

13 Oct 9.30-11.30 (£53)

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

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 2026 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



14 Oct 9.30-11.30 (£63)

14 Oct 11.45-12.45 (£42)

Ethics for Accountants and Auditors (2 hr)

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 updated 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



21 Oct 9.30 – 11.30 (£53)

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, thus providing an invaluable insight. Exact content will depend on what is topical at the time of the training but is likely to include:

- Hot topics – accounting issues currently on HMRC's radar
- Changes to UK GAAP – how they will be treated for tax
- 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

17 Nov 9.30 – 12.30 (£84)

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:

- What's changed for FRS 102 and FRS 105 for periods commencing 1 January 2026
- 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?
- FRS 105 – frequently asked questions
- Update on filing rules for small and micro entities under the Economic Crime Act

Property Accounting Issues (3 hr)

Most practitioners act for clients that have some accounting issues relating to trading and investment properties. This session will look in depth at all the relevant issues and consider solutions in the event that either FRS 102 or FRS 105 is being applied. Topics covered will include:

- Accounting implications of raising finance for property transactions
- Classifying properties in financial statements
- Investment property accounting – frequently asked question
- When should property developers recognise revenue?
- Construction contract accounting – key tips and traps
- FRS 102 v FRS 105 – key similarities and differences

  24 Nov 9.30 – 12.30 (£63)

1 Dec 9.30-12.30 (£63)

Date	Audit courses
10-Mar	Planning an ISA Compliant Audit
23-Mar	Journals testing
15-Apr	Analytical Review
15-Apr	Auditing Revenue
21-Apr	Audit - All the Bits you Used to Know
05-May	How to Become an Effective Audit Junior
11-May	Spring Audit Update
04-Jun	Audit Compliance Principals' Regulatory Update
09-Jun	How to Become an Effective Audit Senior
18-Jun	Top Tips for an Efficient Audit
24-Jun	Auditing Groups
26-Jun	How to Become an Effective Audit Manager

Date	Audit courses
15-Sep	Introduction to Audit - part 1
22-Sep	Introduction to Audit - part 2
29-Sep	ISQM 1, Quality Reviews and RCA: All you need to know
01-Oct	Data Analytics and AI
07-Oct	Fraud and Scepticism
13-Oct	Top 5 File Review Issues
21-Oct	Auditing Wages and Salaries
05-Nov	Autumn Audit Update
09-Nov	How to Close Down an Audit
09-Nov	Materiality and Sampling
03-Dec	What Makes a Good New RI



Planning an ISA Compliant Audit (3 hr)

Although good audit planning can deliver significant audit efficiencies, cold file reviewers frequently tell us that this stage of the audit is not tackled well. Focussing on the requirements for smaller SME audits, this practical session will refresh your knowledge of all the important aspects. Topics covered will include:

- How to perform an audit risk assessment and what it should reveal
- Minimum controls work requirements
- Planning the work – substantive vs controls based testing; sample sizes
- Calculating and using materiality calculations
- Top tips for audit efficiency
- Crucial documentation requirements and how to comply

Journals Testing (1 hr)

Journals testing is often criticised by cold file reviewers and professional bodies, but what is actually required? This one-hour seminar will provide crucial insights into the purpose of journals testing and how it should be carried out and documented. Topics covered will include:

- Why is journals testing so important?
- Identifying your population and which journals to test
- Follow up work – what's required in terms of validation
- Effective and efficient use of audit data analytics tools in journals testing
- Key tips and traps – what regulators tell us goes wrong
- How to document journals testing on file

  10 Mar 9.30 – 12.30 (£63)

23 Mar 12.30-1.30 (£32)

Analytical Review (90 mins)

As audit firms strive increasingly for efficiency of effort, analytical review can be a very useful tool – and yet professional bodies are very critical of how it is performed and documented. This short session will highlight a number of important tips and traps. Topics covered will include:

- Using preliminary analytical review procedures to understand the entity and its financial performance
- Determining the suitability of using substantive analytical procedures as audit evidence
- Using final analytical review to perform an overall review and meet ISA requirements
- Developing a reliable expectation figure to compare against actual results
- Using relevant and reliable sources of evidence
- Producing working papers – what professional bodies expect to see on file

Auditing Revenue (90 mins)

Revenue is one of the key figures in the financial statements but one that regulators tell us is often audited badly. This seminar will address all the crucial requirements and highlight common pitfalls and how to avoid them. Topics covered will include:

- Evaluating revenue recognition policies, updating systems notes and internal controls
- Handling the presumption of fraud in revenue recognition
- Substantive testing of revenue – how it's done and what to put on file
- Sample size selection
- Performing and using analytical procedures when testing revenue



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

Effective compliance with auditing standards is a challenge for many firms but is crucial in view of the increasing focus on audit quality and robust monitoring by ICAEW and ACCA inspectors. This popular course will provide a file reviewer's perspective on the key areas when completing an SME audit and where audit documentation often goes wrong. Topics covered will include:

- Considerations for setting materiality and performance materiality
- Do's and don'ts when identifying risks
- Considerations for determining an effective testing approach
- Audit sampling and common problems to avoid
- How to perform and document testing in key areas such as revenue and journals
- 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 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



21 Apr 9.30 – 12.30 (£63)

5 May 9.30 – 12.30 (£63)

Spring Audit Update (3 hr)

Following monitoring reports from FRC and QAD, there is increasing pressure on audit firms to improve audit quality. This course will look at recent and upcoming changes in audit, as well as those areas where auditors can improve audit quality. 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 revisions to ISAs and guidance
- Changes to the FRC Ethical Standard for auditors
- Changes to Audit Regulation
- Important proposed changes and exposure drafts
- Feedback from FRC, ICAEW and ACCA
- Issues arising from FRC disciplinary cases
- Audit reform
- Application problems with ISA 600 (Revised) Group audits
- Topical issues from ICAEW Audit and Assurance Faculty

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 in order to ensure compliance with regulatory requirements whilst balancing crucial commercial considerations. Exact content will depend on what is topical at the time but is likely to 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 three 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 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 the impact on audit testing
- 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
- Effectively managing your own time
- Reviewing the work of audit juniors, and managing and coaching them effectively

Top Tips for an Efficient Audit (3 hr)

With the ever-increasing requirements, 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 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



9 Jun 9.30 – 12.30 (£63)

18 Jun 9.30 – 12.30 (£63)

Auditing Groups (3 hr)

The revisions to ISA (UK) 600 for periods commencing after 15 December 2023 brought into sharp focus the challenges that many auditors face when auditing groups. The revisions have affected 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 have been 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

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:

- The importance of the manager role
- 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



Introduction to Audit – Part 1

(3 hr)

This two-part course, targeted at those who are soon to start, or have recently started, working in audit, will provide a grounding in the concepts behind the audit process. It will also serve as a useful 'back to basics' for those who are returning to audit having worked away. Topics covered in part one will include:

- What an audit is and why it is performed
- Audit assertions and directional testing
- Key communication skills
- Producing effective working papers
- Systems and controls work – what, why and how?
- Auditing bank and fixed assets

Introduction to Audit – Part 2

(3 hr)

This two-part course, targeted at those who are soon to start, or have recently started, working in audit, will provide a grounding in the concepts behind the audit process. It will also serve as a useful 'back to basics' for those who are returning to audit having worked away. Topics covered in part two will include:

- Fundamentals of analytical review and how it is used throughout the audit
- How to be 'professionally sceptical'
- Picking samples and evaluating errors
- Important balance sheet and P&L tests
- Fundamentals of audit ethics
- Audit materiality fundamentals – what it is and why it matters

  15 Sept 9.30 – 12.30 (£63)

22 Sept 9.30-12.30 (£63)

ISQM 1, Quality Reviews and RCA: All you need to know (3 hr)

ISQM 1 and 2 application remains a challenge for many firms and a common bone of contention on QAD/ACCA inspection visits. Using case studies and example documentation, this course will provide an essential insight into exactly what independent firms need to do to comply with both ISQM 1 and ISQM 2. Topics covered will include:

- Developing a sound strategy for good quality management
- The role of the RI in embedding audit quality
- What good looks like – typical policies and procedures for independent firms
- How to interact with service providers – key tips and traps
- Tackling key strategic and governance barriers in independent firms
- Using root cause analysis to really drive improved audit quality

Data Analytics and AI (3 hr)

Data analytics and Artificial Intelligence (AI) create huge opportunities for accountants, but the implementation of such technologies needs to be handled with care. We will use the insights of subject specialist John Toon to explore practical steps that firms can use to embrace these tools. Topics covered will include:

- What are data analytics and AI and how can they help accountants?
- Practical first steps to take for firms to take
- Important operational and commercial considerations when using data analytics and AI
- Top tips for training the team
- Important ethical and data protection issues – important considerations to stay compliant



Fraud and Scepticism (3 hr)

Auditors are constantly being told by regulators that a more thoughtful approach to fraud risk needs to be adopted when planning and performing audits, with greater focus on professional scepticism. This seminar will provide a practical insight into what this means in practice. Topics covered will include:

- What are auditors' responsibilities relating to fraud?
- What fraud and risk actually looks like in SME businesses
- Demonstrating professional scepticism when performing and documenting an ISA audit
- Developing a sceptical mindset throughout the audit team
- Practical steps to take when tackling presumed fraud risks in relation to revenue recognition, journals and related party transactions

Top 5 File Review Issues (1 hr)

This highly practical one-hour session will focus on the most common issues identified by our file review team. It will look at the reasons why these issues arise and consider what actions you can take to prevent them happening on your files. Topics covered will include:

- Common testing deficiencies and why they arise
- Key documentation requirements – what reviewers expect to see
- Professional body feedback and why it matters
- Recent disciplinary cases underpinning our findings
- Linking file reviews and the system of quality management to tackle quality issues

  7 Oct 9.30-12.30 (£63)

13 Oct 12.30-1.30 (£32)

Auditing Wages and Salaries (1 hr)

Wages and salaries is an area of the audit which is often flagged on file reviews as requiring improvement, especially given the related fraud risks. This short seminar will highlight the important misstatement risks and key audit steps to address them. Topics covered will include:

- Key relevant audit assertions when auditing wages and salaries
- Common misstatement risks
- Which tests are needed on file – and which aren't
- Requirements where service organisations (payroll bureau) are used by audit clients
- Common issues raised by audit cold file reviewers - and how to address them

Autumn Audit Update (3 hr)

There is lots changing in the world of audit. Auditing standards continue to change and 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. Exact content will depend on what is topical at the time of the session but is likely to include:

- ISA changes in 2025/6 – what they mean in practice
- The impact of recent FRC guidance on smaller entity audits
- 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



How to Close Down an Audit (2 hr)

Firms often tell us that even some of their cleanest audits can run into problems at the completion stage and can be a challenge to get over the line whilst keeping costs under control. This session will cover all the important completion tasks and how to complete them effectively and efficiently, avoiding 'close down drag'. Topics covered will include:

- How to perform and document the going concern and subsequent events review
- Manager and engagement partner review – what's required
- Dealing with misstatements
- Communication with the client and those charged with governance
- Important pitfalls with file lockdown and archiving and how to avoid them
- Common cold file review gripes and how to avoid them

Materiality and Sampling (1 hr)

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 overall 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

  9 Nov 9.30-11.30 (£53)

9 Nov 12.30-1.30 (£32)

What Makes 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. Topics covered will include:

- 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

Company Secretarial Refresher and Update (3 hr)

Many professional firms support clients with company secretarial services and a good working knowledge of the relevant Companies Act sections and Companies House rules is important when working in this area. This course will provide a comprehensive insight into all the important rules and regulations. Exact content will depend on what is topical at the time of the training but is likely to include:

- Economic Crime and Corporate Transparency Act 2023 – changes to date and in the pipeline
- Company formation essentials
- Refresher on register of persons with significant control (PSC) requirements
- Appointing and removing directors
- Changes to share capital – important legal and procedural requirements
- Important rules on meetings and resolutions
- Refresher on other Companies Act requirements and topical areas

Date	Regulatory courses
02-Jun	Company Secretarial Refresher and Update
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

2 Jun 9.30-12.30 (£63)



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. Exact content will depend on what is topical at the time of the training but is likely to 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 & Quality 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



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 2026

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 2026

Payroll Update (3 hr)

Date	Tax courses
12-Mar	Payroll Update
20-Mar	Spring Tax Update
23-Apr	Incorporation, Disincorporation and Other Tax Planning
28-Apr	Capital Gains Tax – The Fundamentals
03-Jun	VAT Common Errors
12-Jun	General Practitioners' Tax Workshop
23-Jun	Tax Issues of Buying and Selling Businesses
16-Oct	Capital Taxes
20-Oct	Autumn Tax Update
04-Nov	MTD Update
10-Nov	VAT Update
23-Nov	Tax Planning from Cradle to Grave
02-Dec	Autumn Budget Update

This course provides an update on changes in payroll taxes and the administration of payroll for the 2025/26 and 2026/27 tax years. The course is suitable for general practitioners and their staff as tax advisors and employers, and employees of companies with responsibility for payroll and HR matters. Topics covered will include:

- Payroll legislation changes: The Budget, Employment Rights
- Expenses and benefits: An overview of the changes required for P11d processing for tax year 2025-2026 and for the current tax year 2026-2027 if payrolling benefits
- Pensions and Auto Enrolment: Pension changes, Future changes for Auto Enrolment
- Other compliance issues: Fair Work Agency, NMW, SSP and Holiday Entitlement

12 Mar 9.30-12.30 (£63)



Spring Tax Update (3 hr)

This session will update delegates on recent developments in the world of taxation. It will cover any legislative changes, key case law decisions that could affect a wide variety of clients and HMRC announcements of importance of tax practitioners.

We will cover income tax, capital gains tax, inheritance tax, SDLT, corporation tax and VAT matters to the extent there have been developments in each.

Incorporation, Disincorporation and Other Tax Planning (3 hr)

Since the increase in Corporation tax rates in recent years, it has become an interesting area of planning as to which is the best structure to operate through. We will consider all aspects of planning related to business structure and profit extraction. Topics covered will include (subject to any recent announcements):

- The tax cost of operating through various business structures
- Profit extraction from limited companies
- Can a partnership be a better option than incorporation?
- The cost of incorporation and how to get the best tax outcomes
- The pitfalls of disincorporation
- Loans to participators



20 Mar 9.30-12.30 (£63)

23 Apr 9.30-12.30 (£63)

Capital Gains Tax – The Fundamentals (3 hr)

This session is designed for accountants and other professionals seeking a refresher on UK capital gains tax (CGT). It will cover liability to CGT, how CGT is calculated and reported and key exemptions and reliefs. Topics covered include:

- Chattels rules
- Assets qualifying for capital allowances
- Private Residence Relief (including deemed occupation, nominations and the effects of inter-spouse transfers)
- Gift relief
- BADR
- Replacement of business assets
- Incorporation, reorganisations and share disposals

VAT – Common Errors (3 hr)

The course will cover VAT areas that practitioners and their staff encounter when dealing with owner managed clients. 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
- Dealing with international transactions
- Understanding transactions involving agents
- Common problems with the CIS domestic reverse charge
- VAT issues when refurbishing or converting properties
- Minimising VAT penalties



General Practitioners' Tax Workshop (3 hr)

This highly practical session will cover tax issues dealt with in the smaller practice and highlight particular topical tax compliance and planning points to be aware of. The session will cover a range of taxes relevant to both personal and business tax clients.

The precise topics to be covered will depend on what is relevant and topical at the time of the course, but is likely to include:

- Incorporation advice
- Penalty regimes – VAT and income tax
- Salary v dividend
- Losses and complications
- Off payroll working – any issues?
- Other topical developments

Tax Issues of Buying and Selling Businesses (3 hr)

This session will consider the tax consequences and issues relating to the disposal by an individual of a business, partnership share or company shares. Topics covered will include:

- The nature of consideration and the tax impact of different types of sale proceeds
- The availability of Business Asset Disposal Relief and other reliefs
- Practical issues and considerations
- Common pitfalls and planning opportunities
- Particular scenarios such as selling to family or employees or selling to Employee Ownership Trusts
- Winding up as an alternative to selling



12 Jun 9.30-12.30 (£63)

23 Jun 9.30-12.30 (£63)

Capital Taxes (3 hr)

This course will update practitioners on developments in all the major capital taxes. It will review legislative changes as well as recent case law developments. There will be a brief review of IHT fundamentals to assist practitioners with estate planning. Topics covered will include:

- Capital gains tax
- Inheritance tax
- Stamp duty land tax
- Stamp duty on shares

Autumn Tax Update (3 hr)

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



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

Tax Planning from Cradle to Grave (3 hr)

Tax is an issue which affects individuals at all points in their lifetime although it becomes crucial at certain points. This course will consider the planning which can affect families both from a personal perspective and for their businesses.

We will cover:

- General tax planning issues for families
- Separation and divorce
- Pensions and other tax effective investments
- Planning through the business lifecycle
- Inheritance and will planning

Autumn Budget Update (3 hr)

This session will identify the key announcements made in the Budget from the documentation and draft legislation issued. It will discuss planning points and issues arising from those announcements.

We will be focusing on the income tax, CGT, IHT, SDLT, corporation tax and VAT implications as well as taxes management and administration, but not any other direct or indirect taxes.





Clare Jones has a professional practice background and is an experienced trainer, specialising in IFRS 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.



Edward Rands was the Risk and Professional Standards partner at a large independent firm for 11 years. He was the firm's audit compliance principal and led the technical team, which was responsible for maintaining accounting and auditing knowledge, and for dealing with complex problems and queries. He now works as an independent consultant, advising firms on technical and regulatory matters.



Gill Barron has been involved in learning and development for more than 20 years. Her training portfolio includes accounting skills, business and finance skills, internal and external audit, risk, and assurance. Gill has a keen interest in combining technical skills with people skills through training on effective communication and report writing, team building and managing difficult situations.



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.



Jo Marshall has nearly 30 years' payroll experience, working in a variety of different roles including 10 years with a HR and Payroll software provider. Her roles have included consultant, project manager, payroll quality manager and implementing a payroll managed service. Jo has been a freelance trainer since 2016, covering topics such as essential payroll, P11d, benefits and expenses, payrolling of benefits, automatic enrolment and pensions, holiday pay and leave entitlement, national minimum wage and off payroll working.



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.



John Toon is a chartered accountant who heads up a team that have data analytics, BI reporting, software development, automation, and systems advisory skills, providing advice on the latest technology trends and how to make use of them effectively, whilst understanding potential risks.





Karen Eckstein is a specialist in risk for tax and accountancy professionals. Having spent over 30 years defending claims against the profession, she saw where claims arose and decided to put her experience and expertise to use in preventing them instead of defending them. She is a practical and pragmatic adviser and a regular and popular speaker on risk issues.



Karen Speight has worked for more than 25 years in professional services, including 11 years as a tax partner. She has extensive experience in many areas of taxation, with her key focus being employer services and related taxation issues. Karen has also written a number of tax books aimed at practitioners.



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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Our News



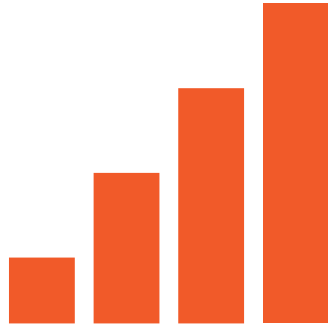
September 2025 Insights Newsletter

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Latest vlog In this month's vlog, Peter Herbert discusses practical issues with identity verification. Latest blog In September's blog, we discuss how to manage and effectively lead [...]

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