



**2017 International Finance Centre  
Online LIVE Professional Development**



**With everything you would expect from a traditional BPP classroom but delivered live and interactive online, you can study wherever you want with less travel and more convenience.**

**Interact with tutors using live chat boxes and online polls to ensure you are able to ask individual questions and test your understanding throughout a course.**

### **Programme and Presenters**

The programme is presented by BPP tutors based in Jersey, each with a different international financial centre specialism.

#### **Financial Reporting Courses – Page 3**

##### **Ciara Tait**

Ciara joined BPP in 2009 after working at one of the 'Big Four' audit firms where she qualified as a Chartered Accountant. She is the Head of Financial Reporting in Jersey and spends time researching the latest updates to Financial Reporting standards and how these are applied in practice in financial services.

#### **Fiduciary Courses – Page 4**

##### **Nina Gomes**

Nina has 18 years' experience in the fiduciary industry. She designs and delivers tailored courses in this area, keeping abreast of all regulatory developments. She also coaches individuals at all levels.

#### **Personal Development Courses – Page 6**

##### **Ian Lucas**

Ian manages all personal development programmes. These courses are aimed at developing the knowledge, skills and performance of managers and staff in a wide range of interpersonal skills. His management experience allows him to draw on many real life examples within his training.

#### **Cost**

The cost of the sessions is £120.00, exclusive of GST. Organisations or individuals who are not exempt from GST will pay an additional 5%.

**NB.** For every one participant you book at the full price you can book a second for half price.

#### **How to book**

Simply complete the booking form at the back of this brochure and forward to [maxinepreddy@bpp.com](mailto:maxinepreddy@bpp.com). Bookings should be received 7 days before the start of the course. If this is not possible please contact Maxine on **711803**. Once BPP has received your booking we will send you confirmation along with full joining instructions.

#### **Change of date, venue or tutor**

BPP reserves the right to change course dates, venues or tutors, or cancel in exceptional circumstances. We will of course advise you of any changes as early as possible.

#### **Terms & conditions**

If you need to make amendments you can email:

[maxinepreddy@bpp.com](mailto:maxinepreddy@bpp.com)

We will accept name changes at any point up to the start of the course free of charge. If it becomes necessary to cancel a course delegate the following policy will apply: Cancellations 28 days or more in advance, no charge/full refund. Cancellations 27 – 7 days in advance, 50% charge. Cancellations less than 7 days in advance, no refund

# Programme Guide

## Financial Reporting

Course Title	Date	Outline	Cost
<b>IFRS 15 Revenue from contracts from customers</b>	2 February, 15.00 – 17.00 GMT	<p>This standard provides a 5 step model to be applied to all contracts with customers. It was issued in May 2014 and will be applied to annual reports beginning 1 January 2018.</p> <p>As a result of this session you will:</p> <ul style="list-style-type: none"> <li>• Gain an understanding of the core principle of IFRS 15 using its 5 step framework</li> <li>• Explore the standard's other requirements such as the recognition and measurement of gains and losses on the sale of some non-financial assets that are not an output of the entity's ordinary activities (e.g. sales of property, plant and equipment or intangibles)</li> <li>• Gain confidence across the disclosure requirements, performance obligations, and key judgements and estimates.</li> </ul>	£120.00
<b>IFRS 9 Financial instruments</b>	5 June, 15.00 – 17.00 GMT	<p>Gain an insight into this new and very relevant accounting standard which takes IAS 39's place from 1 January 2018. As a product of the 2007 financial crisis, its new prudent impairment methodology will be one both you and your clients will need to be ready for.</p> <p>As a result of this session you will:</p> <ul style="list-style-type: none"> <li>• Gain an understanding of IFRS 9's new impairment methodology</li> <li>• Understand the Measurement and Recognition criteria of IFRS 9</li> <li>• Understand the new, simplified rules for hedge accounting.</li> </ul>	£120.00
<b>IFRS 13 Fair value measurement</b>	3 October, 15.00 – 17.00 GMT	<p>Gain an insight into this standard which defines fair value, illustrates the framework for measuring fair value, whilst gaining an understanding of the relevant disclosures necessary.</p> <p>As a result of this session you will:</p> <ul style="list-style-type: none"> <li>• Learn about IFRS 13's fair value hierarchy and how it has enhanced the comparability and consistency within Financial Reporting</li> <li>• Gain confidence in creating disclosures which comply with IFRS 13</li> <li>• Gain an understanding of which standards are exempt from following IFRS 13 and why, for example IFRS 2 <i>Share-based payments</i> and IAS 2 <i>Inventories</i>.</li> </ul>	£120.00
<b>IFRS 16 Leases</b>	9 November, 15.00 – 17.00 GMT	<p>This accounting standard will replace IAS 17. Companies are required to comply with IFRS 16 from 1 January 2019 but can apply early adoption as long as they are also applying IFRS 15 <i>Revenue from Contracts with customers</i>.</p> <p>As a result of this session you will:</p> <ul style="list-style-type: none"> <li>• Understand the reasons for this change</li> <li>• Learn about the key changes from IAS 17 and the ultimate implications the changes will have on the Financial Statements including disclosures</li> <li>• Understand the impact the changes will have on debt covenants, financial gearing and a company's cost of borrowing.</li> </ul>	£120.00

## Fiduciary Courses

Course Title	Level	Date	Outline	Cost
<b>Investments for administrators</b>	Foundation	23 February, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What is a share?</li> <li>• Why chose a share?</li> <li>• Dividends</li> <li>• Market volatility of shares</li> <li>• What is a bond?</li> <li>• Why chose a bond?</li> <li>• Par, coupon, yield to maturity</li> <li>• What are funds?</li> <li>• Why chose a fund?</li> <li>• NAV</li> <li>• Risk and return</li> <li>• Portfolio objectives</li> <li>• Portfolio composition</li> </ul>	£120.00
<b>Roles and responsibilities of trustees</b>	Foundation	8 March, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• Powers and duties of trustees</li> <li>• Basic trustee duties: Not to profit: Keech v Sandford</li> <li>• The duty of care</li> <li>• Beneficiaries: rights and difficulties</li> <li>• General trustee investment issues: preserve and enhance</li> <li>• Underlying companies: Bartlett and trustee duties</li> <li>• Shams: types, transfers, settlor problems, the effect of a trust being declared a sham</li> <li>• How to avoid Shams</li> <li>• Trustee duties</li> <li>• Trustee meetings</li> <li>• Trust records</li> </ul>	£120.00
<b>Effective minute writing</b>	All	5 April, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What are minutes?</li> <li>• Contents</li> <li>• Typical wording</li> <li>• Why do service providers produce minutes?</li> <li>• Effective record keeping and administration</li> <li>• Offshore Trust minutes</li> <li>• Why do Trustees produce minutes</li> <li>• Litigation and disputes</li> <li>• Protectors</li> <li>• Offshore Company minutes</li> <li>• Why do Companies produce minutes</li> <li>• Types of meetings</li> <li>• Litigation and disputes</li> <li>• Written resolution vs minutes</li> </ul>	£120.00
<b>What is a company?</b>	Foundation	21 June, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What is a company?</li> <li>• Separate legal personality</li> <li>• Veil of incorporation</li> <li>• Limited liability</li> <li>• Exercise / Advantages and disadvantages of companies</li> <li>• Characteristics of a Company</li> <li>• Members / shareholders</li> <li>• Directors</li> <li>• Secretary</li> <li>• Annual Returns</li> </ul>	£120.00

			<ul style="list-style-type: none"> <li>• Types of Companies</li> <li>• Company incorporation</li> <li>• Registers</li> <li>• Secretary</li> <li>• Members</li> <li>• Directors</li> <li>• What is a share?</li> <li>• Share certificates</li> <li>• Dividends</li> <li>• Transferring shares</li> <li>• Registered Office</li> </ul>	
<b>What is a trust?</b>	Foundation	11 September, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What is a Trust?</li> <li>• Why set up a trust?</li> <li>• The history of Trusts</li> <li>• 3 Certainties</li> <li>• How is a Trust created?</li> <li>• Who are the parties to a trust? <ul style="list-style-type: none"> <li>• Settlers and their role</li> <li>• Beneficiaries and their interests and rights</li> <li>• Trustees and their duties and powers</li> <li>• Protectors</li> </ul> </li> <li>• Types of trusts used in offshore jurisdictions and why</li> <li>• Trust documentation</li> </ul>	£120.00
<b>The use of trusts, companies and foundations</b>	Foundation	23 October, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What is a foundation, compare to trust and company</li> <li>• Uses of foundations</li> <li>• Why trusts are used offshore</li> <li>• Various types of trust including: Discretionary, Accumulation and Maintenance, Fixed interest</li> <li>• Types of trusts: Asset protection trusts</li> <li>• Types of trusts: Charitable trusts</li> <li>• Types of trusts: Offshore purpose trusts</li> </ul>	£120.00
<b>Fiduciary decision making</b>	All	22 November, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>• What is expected of a signatory?</li> <li>• Knowing your client and decision making</li> <li>• Risk awareness</li> <li>• What is risk?</li> <li>• Types of risk</li> <li>• Making decisions to mitigate risk</li> <li>• Tax awareness</li> <li>• What tax matters need to be considered</li> <li>• Investments and decision making</li> <li>• Advisory and execution only portfolios</li> <li>• Types of investments</li> <li>• Accounts and decision making</li> <li>• What to review in the accounts</li> <li>• Beware</li> </ul>	£120.00



## Professional Development

Course Title	Date	Outline	Cost
<b>Creating an exceptional team</b>	13 February, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Teams form building blocks of organisations to deliver competitive advantage. However, in order to do so managers need to define a common goal, understand how people want to work together and the behaviours required to develop better team performance</li> <li>This session will focus on the diverse roles required to build a successful team and how to develop the team into a harmonious unit.</li> </ul>	£120.00
<b>Managing stress</b>	28 April, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Identify the signs, symptoms and potential causes of stress</li> <li>Identify actions you can take to deal with pressure and demands more effectively</li> <li>Recognise the steps you can take to minimise stress in yourself</li> </ul>	£120.00
<b>Developing resilience</b>	6 June, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Personal resilience is arguably the most important resource for coping well during challenging times</li> <li>This session will explore the options available to help staff bounce back after a setback and develop their resilience to future challenges</li> </ul>	£120.00
<b>Time management</b>	5 July, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Personal time management skills are essential for effectiveness at work</li> <li>During this course delegates will identify their personal “time- stealers”. Once identified, they can then determine the actions they need to take to gain control of the time they have available, in order to maximise their personal productivity</li> <li>By the end of the course delegates will understand the importance of planning and prioritisation of their work.</li> </ul>	£120.00
<b>The role of the manager</b>	9 August, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Management is about knowing what needs to be done, then getting results through other people</li> <li>This course will discuss the key characteristics, attitudes and behaviours necessary to become a successful and respected manager who acts as a powerful role model in leading their team.</li> </ul>	£120.00
<b>Motivating and engaging your team</b>	19 September, 15.00 – 17.00 GMT	<ul style="list-style-type: none"> <li>Motivating people to go the extra mile, willingly, is the key to any successful people management role</li> <li>During this session delegates will discuss the theories behind motivation and discover practical techniques to unlock individual motivators to greatly improve the performance, productivity and satisfaction of team members.</li> </ul>	£120.00

# Professional Development Booking Form

Personal details		Authorisation to invoice employer	
Title	Date of Birth	Company Name	
First Name		Company Billing Address	
Last Name			
Home Address		Town/City	Post Code
Town/City	Post Code	Authorising Manager	
Email		Job Title	Tel
Tel		Email	
Signature*		Authorising Signature*	
<p>*Student signature, by signing, I accept BPP's Privacy Policy (as amended from time to time) and consent to BPP providing the personal data (including sensitive personal data) to my Employer. By submitting this application form, I confirm that I agree to the terms and conditions applicable to the course(s) and study materials.</p>		<p>*I am authorized by the above company to authorize payment of the course and study material fees set out in this application form and , by signing this application, I confirm that the above company agrees to the terms and conditions applicable to such sponsorship and set out in the terms and conditions applicable to the course(s) and study materials.</p>	
<p><b>Please circle as applicable below</b></p> <p>Self-funded _____ Employer funded _____</p>		GST ISE Number	
		PO Number	
		Accounts Payable Tel	
		Accounts Payable Email	
<p>Do you have any special needs/disability that may affect you in the event of a building evacuation whilst you are on BPP premises? Yes No</p> <p>(If yes, please arrive for the start of the first day of your course 15 minutes early to allow for the local site Health &amp; Safety Officer to complete the necessary evacuation procedure and assessments with you.)</p>			
<b>Course details</b>			
Session		Start date	Price
<b>Payment details</b>			
<p>By <input type="checkbox"/> cheque Please enclose cheque made payable to <b>BPP (CI) Limited</b></p>			
<p>By card <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard <input type="checkbox"/></p>			
Card holder's name			
Card holder's address			
Post Code		Date	
Card Number			
Security code		Valid from	Expiry date
Send to <b>Maxine Preddy</b>		Email <b>maxinepreddy@bpp.com</b>	Tel + <b>44 (0)1534 711800</b>

**BPP Professional Education**

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EDUCATION