BPP Professional Development Brochure 2018
## Brochure contents

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<td>3. Financial accounting professional development courses</td>
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<td>3c. Manager courses</td>
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<td>5. Personal development courses</td>
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<td>6. Banking and investment professional development courses</td>
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## 1. Preparing for work soft skills courses

<table>
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<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
<th>Cost</th>
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</table>
| Interview skills      | • First impressions  
                       | • Managing nerves  
                      | 04 June, 12.00 – 13.30 | £20  |
|                       | • How to get an interview  
                       | • What to expect  
                       |                  |      |
| CV writing            | • The need for a CV  
                       | • How to write a CV  
                      | 06 July, 12.00 – 13.30 | £20  |
|                       | • Common issues on CVs  
                       |                  |      |
| Office etiquette      | • This session is ideal for staff who are new to an office environment  
                       | • The content includes appropriate and inappropriate office behaviour; suitable office dress; professional use of the telephone; professional communication; handling typical office interruptions, visitors, phone calls and requests  
                      | 16 August, 12.00 – 13.30 | £20  |
| Communication         | • What is effective communication?  
                       | • What happens when communication goes wrong?  
                      | 12 October, 12.00 – 13.30 | £20  |
|                       | • The communication process  
                       | • Barriers to communication  
                      |                  |      |
|                       | • Questioning techniques  
                       | • How we communicate  
                      |                  |      |
|                       | • Rapport  
                       |                  |      |
| Business writing      | • Plain English  
                       | • What is business writing?  
                      | 27 November, 12.00 – 13.30 | £20  |
|                       | • Effective writing essentials  
                       | • Structuring written communication  
                      |                  |      |
|                       | • How to plan your letter  
                       | • Making a good first impression  
                      |                  |      |
|                       | • Paragraphs  
                       | • Unnecessary words  
                      |                  |      |
|                       | • Simplifying words  
                       | • Closing sentences  
                      |                  |      |
|                       | • Tone  
                       | • Grammar  
                      |                  |      |
|                       | • Use of bullet points  
                       | • E-mail specifics  
                      |                  |      |
| Time management       | • Efficient vs effective  
                       | • Recognise and take appropriate action to minimise Time Wasters in your daily routine  
                      | 07 December, 12.00 – 13.30 | £20  |
|                       | • Write a SMART Goal  
                       | • Structure an Action Plan to achieve your SMART Goal(s)  
                      |                  |      |
|                       | • Prioritisation  
                       | • Prioritise your To Do list  
                      |                  |      |
## 2. Fiduciary professional development courses

### 2a. Target Audience - First Steps

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
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</table>
| **What is a trust?**          | What is a Trust?  
• Why set up a trust?  
• The history of Trusts  
• 3 Certainties  
• How is a Trust created?  
• Who are the parties to a trust?  
• Settlers and their role  
• Beneficiaries and their interests and rights  
• Trustees and their duties and powers  
• Protectors  
• Types of trusts used in offshore jurisdictions and why  
• Trust documentation | 02 February, 12.00 – 14.00 & 20 September, 13.00 – 15.00 | £99   |
| **What is a company?**        | What is a company?  
• Separate legal personality  
• Veil of incorporation  
• Limited liability  
• Characteristics of a Company  
• Types of Companies  
• Members / shareholders  
• Directors  
• Secretary  
• Company incorporation  
• Memorandum and Articles of Association  
• Share capital  
• Registers  
• Dividends  
• Registered Office | 23 February, 12.00 – 14.00 & 15 October, 17.00 – 19.00 | £99   |
| **Introduction to foundations** | Uses of foundations  
• Examples of uses  
• Services that could be provided  
• The Charter  
• The Regulations | 7 March, 12.00 – 13.00 | £65   |
| **Introduction to limited partnerships** | General partnerships  
• Limited partnerships  
• The partners  
• Formation of a Limited Partnership  
• Incorporation of the General Partnership  
• Uses of Limited partnerships  
• New varieties  
• End of the road | 18 April, 12.00 – 13.30 | £80   |
### What is corporate governance?
- Governance: what is it?
- Making principles clear
- Agency
- Stakeholders & CSR
- Smaller companies
- The improve CG project
- JFSC Issues
- The effective offshore board (+ committees)
- Internal control and risk
- Lots of practical matters scattered throughout

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<thead>
<tr>
<th>Date</th>
<th>Cost</th>
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<tr>
<td>23 May, 12.00 – 14.00</td>
<td>£99</td>
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### The role of the company secretary
- What is a company secretary?
- Who needs a company secretary?
- Basic responsibilities
- Authority
- Board meetings
- Minutes
- Offshore issues
- Statutory administration
- Annual return
- Reviving a Jersey Company
- Public or Private company
- Submitting documents to the registry

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<thead>
<tr>
<th>Date</th>
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<tr>
<td>05 June, 12.00 – 14.00</td>
<td>£99</td>
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### Minute writing
- What are minutes?
- Contents
- Typical wording
- Why do service providers produce minutes?
- Effective record keeping and administration
- Offshore Trust minutes
- Why do Trustees produce minutes
- Litigation and disputes
- Protectors
- Offshore Company minutes
- Why do Companies produce minutes
- Types of meetings
- Written resolution vs minutes

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<th>Date</th>
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<tr>
<td>27 June &amp; 12 December, 12.00 – 14.00</td>
<td>£99</td>
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### 2b. Target Audience - Supervisor

#### Course Title: Role and responsibilities of a trustee
- What is a Trustee
- Trustee duties
- Anti Bartlett
- Trustee powers
- Trustee liability
- Beneficiaries rights
- Sham trusts
- Trustee decision making
- Trustee meetings
- Trustee records
- Beware

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<tr>
<td>12 April, 12.00 – 14.00</td>
<td>£99</td>
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#### Course Title: Incorporation and dissolution of a company
- Incorporation of a Jersey company
- Choosing a name, registry application forms
- Certificate of incorporation
- Winding up a Jersey company
- A just and equitable winding up
- Dissolution of a company
- Corporate insolvency procedures
- Creditors winding up
- A désastre

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<td>20 June, 12.00 – 14.00</td>
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| Uses of trusts, companies and foundations | - What is a foundation, compare to trust and company  
- Uses of foundations  
- Operation of a foundation  
- Why are companies and trusts used offshore: Basic structures  
- Risks associated with the uses of various trusts  
- Types of trusts: Asset protection trusts  
- Types of trusts: Charitable trusts  
- Types of trusts: Offshore purpose trusts | 29 June, 12.00 – 14.00 | £99 |
| Duties and responsibilities of a Jersey director | - What is a director: employee or not?  
- Who may represent the company- agency  
- Authority of agents: express, implied, apparent, estoppel, by operation of the law  
- Types of director including defacto and shadow directors and consequences  
- Appointment and removal of directors  
- Directors duties: Jersey law and UK law  
- Issues for offshore directors: offshore control  
- Insider dealing | 27 November, 12.00 – 14.00 | £99 |
| Governance of unlisted and private companies | - Governance: what is it?  
- Listed / unlisted  
- The agency problem  
- Smaller companies  
- Stakeholders  
- The company lifecycle: issues  
- Phase 1: Sound entrepreneurship  
- Phase 2: The advisory council  
- Phase 3: The active board of directors  
- Phase 4: Governance structures: Committees  
- Lots of practical matters | 5 December, 12.00 – 14.00 | £99 |

### 2c. Target Audience - Manager

<table>
<thead>
<tr>
<th>Course Title</th>
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<th>Date</th>
<th>Cost</th>
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</table>
| **Regulated financial services business – how to improve corporate governance** | - Governance: what is it?  
- Making principles clear  
- The modified agency problem  
- Smaller companies  
- JFSC issues  
- The effective board (+ committees)  
- Internal control and risk  
- Lots of practical matters | 3 December, 12.00 – 14.00 | £99 |
| **Ethics** | - Are ethical behaviours relevant to modern business?  
- The place of a business in society  
- Stakeholders: managing them  
- Four ethical theories: Why is that person/business/stakeholder group thinking like that or behaving like that?  
- How people make ethical decisions: Kohlberg  
- How to solve a business decision making conflict: decision making models  
- How to develop an ethical code/code of business conduct based on the above | 10 December, 12.00 – 13.30 | £80 |
### 3. Financial accounting professional development courses

#### 3a. Target Audience - First Steps

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<tr>
<th>Course Title</th>
<th>Course Outline</th>
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| **Introduction to bookkeeping**                 | • Introduction to the fundamental concepts of double entry  
• Examples of some basic bookkeeping of transactions  
• Summary of the process from bookkeeping to financial statements                                                                                          | 06 - 07 February and 02 - 03 August, 09.00 – 16.00 | £299  |
| **Intermediate bookkeeping**                    | • Brief recap of the key principles of bookkeeping  
• Focus on the more complex areas of bookkeeping (accruals, prepayments, asset revaluation etc.)  
• Summary of the effect on financial statements                                                                                                       | 22-23 February and 09–10 August, 09.00 – 16.00 | £350  |
| **Basic bookkeeping for fund administrators**   | • Provides an understanding as to why accounts should be prepared  
• Use examples of ledger accounts using double-entry bookkeeping tailored to the fund environment,  
• Look at examples of typical fees (e.g. management fees) and income.                                                                                  | 12 June, 10.00 - 13.30                      | £145  |
| **Assets and Liabilities - simplifying accounting policy choices** | • Provides a recap of the choices of accounting policy when dealing with all assets and liabilities.  
• Focus on fixed assets revaluation vs depreciating cost.  
• Looking at the effect of accounting policy on the financial statements.                                                                              | 18 June, 16.30 -18.30                      | £99   |
| **Interpreting a set of Company Accounts**      | • Recap of the qualitative characteristics  
• Accounting for fixed assets  
• Debt vs equity  
• Reviewing and interpreting accounts using ratio analysis  
• Practical case studies                                                                                                                                | 02 October, 09.00 – 12.00                  | £120  |
| **Interpreting a set of Trust Accounts**        | • Understanding different types of trust from an accounting perspective  
• The format of trust accounts  
• Income versus capital  
• Interpretation of companies vs trusts  
• Practical case studies                                                                                                                                 | 19 November, 09.00 – 12.00                 | £120  |
## 3b. Target Audience - Supervisor

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| **Case Study: Reviewing company accounts** | • We will analyse a set of company accounts taking into account macroeconomic conditions and ratio analysis  
• By applying ratio analysis to a set of company accounts it enhances a company’s ability to understand where some weaknesses lie within a business. It is also a key feature of the whole decision making process form an internal and external perspective. | 25 April, 12.00 – 14.00 | £99 |
| **FRS 102; the basics** | • We will revise the overall framework to understand who should be complying  
• We will look at the impact ‘New’ UK GAAP had on our accounts on a line by line technical basis from revenue, to financial instruments, leases, PPE, intangible assets and many more  
• This session will also detail the impact of the change from FRSSE to FRS 102 1a. This section of FRS 102 merely brings small entities in line with large entities by introducing an international framework. | 13 June, 12.00 – 14.00 | £99 |
| **Interpretation of fund accounts** | • Aimed at administrators, or accountants entering the world of funds  
• This will cover a general set of fund accounts, including:  
• Primary statements  
• Key Disclosures  
• Regulatory requirements | 24 September, 13.00 – 15.00 | £99 |

## 3c. Target Audience - Manager

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<th>Course Title</th>
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<tr>
<td><strong>FRS 102 - advanced (JSCCA)</strong></td>
<td>With the recently published exposure draft from the FRC, we will explore what further changes are expected across both FRS 102 and FRS 102a from director’s loans to investment property valuations as well as intangible assets and PPE.</td>
<td>08 February, 12.00 – 14.00 and 16.30 - 18.30</td>
<td>£65</td>
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</table>
| **IFRS 16 Leases - advanced (JSCCA)** | This accounting standard will replace IAS 17. Companies are required to comply with IFRS 16 from 1 January 2019. As a result of this session you will:  
• Learn about the key changes to IAS 17 and the ultimate implications the changes will have on the financial statements.  
• Understand the impact the changes will have on debt covenants and financial gearing and a company’s cost of borrowing. | 22 March, 16.30 – 18.30 | £65 |
| **JFSC Update on topical issues (JSCCA)** | • Recent changes to local regulations  
• Commission areas of focus  
• Update on National Risk Assessment  
• Jersey's positioning with international bodies | 26 April, 16.30 – 18.30 | £65 |
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<th>Course</th>
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| **IFRS 9; Financial Instruments - advanced (JSCCA)** | 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. As a result of this session you will:  
- Gain an understanding of IFRS 9’s new impairment methodology  
- Understand the measurement and recognition criteria of IFRS 9  
- Understand the new, simplified rules for hedge accounting.                                                                 | 24 May, 2018                  | 12.00 – 14.00 and 16.30 - 18.30 | £65  |
| **Finance for non-finance managers**        | This course will look at the key concepts of both financial and management accounting. By the end of the day participants will understand:  
- The need for financial records and the fundamental concepts of financial statements  
- The format of balance sheets and profit and loss accounts  
- Standard accounting adjustments  
- How to interpret a set of financial statements  
- The concepts of liquidity  
- The concepts and methods of budgeting, forecasting and re-forecasting  
- The use of budgeting and management accounting within performance management  
- Classifications used in the analysis of costs including by function, direct and indirect, fixed and variable  
- How to define and distinguish between capital and revenue expenditure                                                                 | 25 June, 2018                 | 09.00 – 16.00           | £225 |
| **IFRS update (JSCCA)**                     |  
- FRS 102/FRS 102a recent changes and exposure drafts  
- IFRS 16 Leases – this new standard effective from January 2019 will have significant impact on operating leases. These leases will no longer be seen on the profit and loss. Instead a large proportion of them will be capitalised on the balance sheet.  
- IFRS 15 Revenue from contracts from customers – effective from 1 January 2018. Gain an understanding of the new revenue standard by following the new ‘5 step approach’.  
- A full update on the IAS 39 to IFRS 9 Financial Instruments transition, effective from 1 January 2018.                                                                 | 05 July, 2018                 | 12.00 – 14.00 and 16.30 - 18.30 | £65  |
| **FRS 102; how has industry adapted? (JSCCA)** | Outline to be advised shortly                                                                                                                                                                                 | 13 September, 2018            | 16.30 – 18.30         | £65  |
| **IFRS 15 Revenue –advanced (JSCCA)**       |  
- Effective from 1 January 2018, this new standard replaces IAS 18 and IAS 11. There will no longer be a differentiation across different industries. With a financial services specific spin on it, this session will look at when income should be accounted for under IFRS 15 in comparison to IAS 18.                                                                 | 22 November, 2018             | 16.30 - 18.30         | £65  |
| Accounting year in review (JSCCA) | This session will look at the key financial reporting changes that we have witnessed over the last 12 months as well as the upcoming changes for 2019.  
We will go through the main impact the new IFRS 15 and IFRS 9 standards have had on our industry in Jersey as well as anticipating how the industry will cope with the new Leases standard effective from 1st January 2019.  
We will also explore the changes seen across FRS 102 and any recent exposure drafts issued by the FRC. | 06 December, 12.00 – 14.00 and 16.30 – 18.30 | £65 |
### 4. Funds professional development courses

#### 4a. Target Audience - First Steps

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<th>Course Title</th>
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<tbody>
<tr>
<td>Introduction to funds</td>
<td>• Fund types</td>
<td>26 February, 10.00 -12.00</td>
<td>£99</td>
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<td>• Fund structures</td>
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<td>• Investments and asset types</td>
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<td>• Investment, liquidation, transactions, dividends and charges</td>
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<td>• Regulations</td>
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<td>Drafting effective minutes</td>
<td>• What are minutes?</td>
<td>22 March, 10.00 – 12.00</td>
<td>£99</td>
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<td>• Contents</td>
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<td></td>
<td>• Typical wording</td>
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<td>• Why do service providers produce minutes?</td>
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<td>• Effective record keeping and administration</td>
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<td>• Offshore funds minutes</td>
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<td>• Why do administrators produce minutes?</td>
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<td>• Litigation and disputes</td>
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<td>• Protectors</td>
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<td>• Offshore companies</td>
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<td>• Types of meetings</td>
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<td>• Written resolution vs minutes</td>
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<td>Overview of private equity</td>
<td>• Introduction to the private equity industry</td>
<td>11 June, 10.00 – 12.00</td>
<td>£99</td>
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<tr>
<td></td>
<td>• Look at key parties, fund structures and common asset types.</td>
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<tr>
<td>Basic bookkeeping for fund administrators</td>
<td>• Provides an understanding as to why accounts should be prepared</td>
<td>12 June, 10.00 - 13.30</td>
<td>£145</td>
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<td>• Use examples of ledger accounts using double-entry bookkeeping tailored to the fund environment,</td>
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<td>• Look at examples of typical fees (e.g. management fees) and income.</td>
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<tr>
<td>Overview of real estate</td>
<td>• An introduction to real estate funds</td>
<td>24 September, 10.00 - 12.00</td>
<td>£99</td>
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<tr>
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<td>• Look at key parties, fund structures and underlying assets.</td>
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#### 4b. Target Audience - Supervisor

<table>
<thead>
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<th>Course Title</th>
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<tbody>
<tr>
<td>The legislative environment</td>
<td>• Introduction to the relevant laws which apply to legal entities</td>
<td>26 February, 13.00 – 15.00</td>
<td>£99</td>
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<td></td>
<td>• Mandatory reporting.</td>
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<tr>
<td>The regulatory environment</td>
<td>• Look at specific regulations and requirements for fund structures across a range of jurisdictions.</td>
<td>22 March, 13.00 – 15.00</td>
<td>£99</td>
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<tr>
<td>Overview of debt investments</td>
<td>• Look at a range of debt instruments, including collateralized loan/mortgages obligations</td>
<td>11 May, 13.00 – 15.00</td>
<td>£99</td>
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<td>• Also look at distressed debt and reasons for investing in such assets.</td>
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<tr>
<td>Introduction to valuations</td>
<td>• Using the IPEV guidelines as a framework</td>
<td>11 June, 13.00 – 15.00</td>
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<td>• Key items to consider in valuing private equity investments</td>
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<td>• Common valuation methods</td>
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Interpretation of fund accounts

- Aimed at administrators, or accountants entering the world of funds
- This will cover a general set of fund accounts, including:
  - Primary statements
  - Key Disclosures
  - Regulatory requirements

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<tbody>
<tr>
<td>Carried interest</td>
<td>An introduction to the principles, risks, basic accounting and reporting for carried interest</td>
<td>13 April, 13.00 – 15.00</td>
<td>£99</td>
</tr>
<tr>
<td>UK Corporate Governance Code - overview and impact</td>
<td>The UK Corporate Governance code applies to UK-listed entities, and has become of critical importance as part of the annual reporting cycle of these entities. This course provides an overview of the main provisions and the impact of the code.</td>
<td>11 May, 10.00 – 12.00</td>
<td>£99</td>
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<tr>
<td>Market abuse legislation (MAR) - overview and impact</td>
<td>MAR came into force on 3 July 2016 for all London-listed entities. This course will consider the impact of the regulation, including closed periods, insider lists and notifications.</td>
<td>29 October, 10.00 – 12.00</td>
<td>£99</td>
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<tr>
<td>Portfolio valuations - issues and controls</td>
<td>Look at the common risks and controls surrounding the valuation of assets, such as the use of a valuation committee and basic accounting issues</td>
<td>23 November, 10.00 – 12.00</td>
<td>£99</td>
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<tr>
<td>Performance fees and equalisation</td>
<td>Introduction to performance fees, Definition and worked example of equalisation for incoming investors</td>
<td>17 December, 10.00 – 12.00</td>
<td>£99</td>
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</table>
## 5. Personal development courses

### 5a. Target Audience - First Steps

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
<th>Cost</th>
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</table>
| Managing time and priorities          | • Personal time management skills are essential for effectiveness at work  
• 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  
• By the end of the course delegates will understand the importance of planning and prioritisation of their work | 20 February, 12.00 – 14.00 | £99  |
| Communication, right first time       | • An overview of how good communication is crucial to the effectiveness of all organisations  
• Improve an individual’s interpersonal communication skills through awareness of personal styles  
• Discussion and practice of alternative approaches when communicating with others | 30 May, 12.00 – 14.00 | £99  |
| Preparing for an appraisal            | • What is Performance Management?  
• Why appraisals fail  
• Goal setting & measuring  
• The Appraisal Interview  
  o Preparation  
  o Structure  
  o Communication  
  o Giving and receiving feedback  
  o SMART Objectives  
  o Agreeing realistic goals and action plans  
• Follow – up | 13 June, 12.00 – 14.00 | £99  |
| Developing resilience                 | • Personal resilience is arguably the most important resource for coping well during challenging times  
• This session will explore the options available to help staff bounce back after a setback and develop their resilience to future challenges | 03 July, 12.00 – 14.00 | £99  |
| Effective business writing            | • Identify the barriers to effective business writing  
• Learn how to plan and structure writing for successful communication  
• Identify common grammatical errors  
• Learn the correct tone, layout and wording required for business writing  
• Identify common e-mail do's and don'ts | 06 September, 12.00 – 14.00 | £99  |
| Complaint handling                    | • Why people complain and the impact on the business  
• Complaint handling skills  
• Getting to the root cause  
• Dealing with the complaint  
• Preventing future complaints | 02 October, 12.00 – 14.00 | £99  |
| Coping in a high pressure environment | • Identify the signs, symptoms and potential causes of stress  
• Identify actions you can take to deal with pressure and demands more effectively  
• Recognise the steps you can take to minimise stress in yourself | 19 November, 12.00 – 14.00 | £99  |
<table>
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<tr>
<th>Course Title</th>
<th>Course Outline</th>
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</table>
| The role of the first line manager *             | • Management is about knowing what needs to be done, then getting results through other people  
• 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                                                                                                                                                                    | 20 February, 16.30 – 18.30 | £99  |
| Leading Change Successfully *                    | • Organisational change is important for survival and development in a changing world. If organisations are to grow and maintain their competitive advantage they must be open to change  
• During this session delegates will identify and understand resistance to change in order to plan and prepare action plans necessary for successfully implementing change                                                                                                                                                        | 24 April, 16.30 – 18.30 | £99  |
| Motivating and engaging your team *              | • Motivating people to go the extra mile, willingly, is the key to any successful people management role  
• 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                                                                                                                                                        | 30 May, 16.30 – 18.30 | £99  |
| Effective Delegation *                           | • A successful manager knows that effective delegation is essential to their own productivity at the same time as developing and motivating their team to achieve their full potential. Done well it creates empowered teams, trusted to deliver beyond expectations  
• Learn how to identify and overcome your personal barriers to delegation then follow a simple process to master this fundamental management skill                                                                                                                                 | 13 June, 16.30 – 18.30 | £99  |
| The gift of feedback *                           | • What is feedback and why is it important  
• Barriers to providing feedback  
• Identifying when and when not to give feedback  
• Planning how to deliver feedback  
• Dealing with difficult feedback                                                                                                                                                                                                                                                                                               | 03 July, 16.30 – 18.30 | £99  |
| Creating an effective team *                     | • 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  
• This session will focus on the diverse roles required to build a successful team and how to develop the team into a harmonious unit                                                                                                                                                                                      | 06 September, 16.30 – 18.30 | £99  |
| Managing pressure in your team *                 | • Pressure can bring out the best in people, but stress has become the number one cause of long-term absence from work  
• Delegates will recognise the signs and symptoms of stress in themselves and others. They will then look at coping strategies and more proactive techniques to prevent pressure building into stress                                                                                                                                                                                  | 02 October, 16.30 – 18.30 | £99  |
### The emotionally intelligent manager *

- Emotional intelligence is the ability to recognise your emotions, understand what they're telling you, and realise how your emotions affect the people around you.
- Emotional intelligence also involves your perception of others. When you understand how others feel, it allows you to manage your relationships with them more effectively.
- This course looks at the five key components of emotional intelligence and practical applications in the workplace to enhance both your personal and interpersonal effectiveness.

### Dealing with difficult situations *

- Managers are frequently faced with difficult situations, yet a lack of knowledge and confidence required to tackle them, means they are often left to fester and escalate.
- This session will look at what situations are difficult, then how to discover and address the true cause in order to bring them to a successful resolution.

### Coaching to develop your team *

- Coaching helps others to ‘unlock’ their full potential and thereby maximise their performance. A coach does not provide answers to problems, but works with their staff to facilitate and enable them to formulate their own ideas and solutions.
- This course will provide you with the tools and skills needed to achieve this.

*Part of the Management Development Programme

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<th>5c. Target Audience - Manager</th>
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<td><strong>Course Title</strong></td>
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| Constructive conflict management | - This course will look at the importance of finding the true cause of conflict  
- You will identify those situations within your control; those you can influence and those you cannot control  
- You will also identify different personal styles and learn to make a conscious choice about your attitude and behaviour in order to respond appropriately to, and manage, conflict | 01 February, 12.00 – 14.00 | £99 |
| Recruitment and interview skills | - Types of interview  
- Planning and preparing  
- Documentation  
- Updating the job description  
- Writing a person specification  
- Reviewing application forms  
- Reviewing the curriculum vitae  
- Logistics  
- Interview skills  
- Communication skills – listening and body language  
- Questioning techniques – open and closed questions  
- Structure and format of interview  
- Recording results  
- Assessment and decision making | 16 March, 12.00 – 14.00 | £99 |
| **Project management** | • Key features of a project  
• Stages of a project  
• Resources – money, manpower, materials & equipment  
• Targets, problems and contingencies  
• Teambuilding including roles, leadership and coaching  
• Responsibility and ownership  
• Communication – face to face, email, meetings  
• Reviews  
• Evaluation | 31 May, 12.00 – 14.00 | £99 |
| **Influencing** | • Techniques to effectively build rapport with others.  
• Recognise different personality types and know the key words that work with each.  
• Recognise other people's values and motivation and frame their message accordingly.  
• Use non-verbal language to support the spoken message.  
• Find win-win solutions that satisfy all parties. | 18 September, 12.00 – 14.00 | £99 |
| **Winning business cases** | • Clarify the specific report requirements  
• Set clear objectives and plan your writing so that it achieves the desired outcome  
• Make a good first impression  
• Ensure your writing is short, direct and active  
• Structure and present your report effectively  
• Make a difference by actively achieving outcomes | 23 October, 12.00 – 15.00 | £120 |
| **Problem solving** | • Your mind  
• Effective decision making  
• Problem solving strategies  
• Developing thinking skills | 13 November, 12.00 – 15.00 | £120 |
| **From manager to leader** | • Define the relationship between leadership and management  
• Identify the key characteristics of leadership and how to apply these at work  
• Recognise your own areas for development and plan how to overcome these | 05 December, 12.00 – 15.00 | £120 |
6. Banking and investment professional development courses

6a. Target Audience - First Steps

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Course Outline</th>
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<tbody>
<tr>
<td>Introduction to investments</td>
<td>• An introduction to the investment environment</td>
<td>27 February, 12.00 – 14.00</td>
<td>£99</td>
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<tr>
<td></td>
<td>• Risks and benefits of investing</td>
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<td>• An overview of the various asset classes</td>
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<td>• Important considerations for an investor</td>
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<td>Introduction to financial services</td>
<td>• An overview of the financial services industry in the UK/offshore</td>
<td>19 April, 12.00 – 14.00</td>
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<td>• Different types of financial institutions and their roles</td>
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<td>• Financial instruments and their characteristics</td>
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<td>• Regulation and consumer protection</td>
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<td></td>
<td>• Tax considerations</td>
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<tr>
<td>Introduction to banking</td>
<td>• An introduction to offshore banking</td>
<td>03 May, 10.00 – 12.00</td>
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<td>• An overview of products and services</td>
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<td>• Methods of transferring funds</td>
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<td>• Foreign exchange</td>
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<tr>
<td>Introduction to offshore investments</td>
<td>• An introduction to the investment environment</td>
<td>21 June, 12.00 – 14.00</td>
<td>£99</td>
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<tr>
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<td>• Risks and benefits of investing offshore</td>
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<td>• An overview of the various asset classes</td>
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<td>• Important considerations for an offshore investor</td>
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<tr>
<td>Introduction to client due diligence</td>
<td>• What is CDD and why is it so important?</td>
<td>09 July, 12.00 – 14.00</td>
<td>£99</td>
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<td>• In what scenarios might EDD be required?</td>
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<td>• Which documents might be required for:</td>
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<td>o A company</td>
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<td>o Complex/consolidated structures</td>
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<tr>
<td>Introduction to operations - settlements/custody</td>
<td>• An introduction to operations</td>
<td>13 September, 12.00 – 14.00</td>
<td>£99</td>
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<td></td>
<td>• The settlements process</td>
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<td>• The role of a custodian</td>
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<td>• Transferring assets in-specie</td>
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6b. Target Audience - Supervisor

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<thead>
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<th>Course Title</th>
<th>Course Outline</th>
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<th>Cost</th>
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<tbody>
<tr>
<td>Investments</td>
<td>• An introduction to the investment environment</td>
<td>06 March, 12.00 – 14.00</td>
<td>£99</td>
</tr>
<tr>
<td></td>
<td>• Risks and benefits of investing</td>
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<td>• An overview of the various asset classes</td>
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<td></td>
<td>• Important considerations for an investor</td>
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</table>
| **Derivatives - pricing and strategies** | Recap of futures, forwards, options and swaps  
The uses of derivatives  
Option premiums  
Strategies | 03 May, 13.00 – 15.00 | £99 |
|---|---|---|---|
| **Investment funds and PCC's** | An introduction to investment funds  
Types & structures including:  
  - Entity type  
  - Underlying assets  
  - Open-ended v Closed-ended  
  - Public/Private  
  - Regulated/unregulated  
Roles of related parties  
An overview of PCCs | 06 September, 12.00 – 14.00 | £99 |
# 7. Tax professional development courses

## 7a. Target Audience - First Steps

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
<th>Cost</th>
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</thead>
</table>
| Introduction to UK income tax                    | • Assessing income  
• Types of income  
• The income tax computation  
• Property income  
• Calculation of tax  
• Expenses and reliefs | 05 February, 08.30 – 10.30 | £99  |
| Introduction to UK capital gains tax             | • Chargeable persons  
• Assets and occasions  
• CGT computation  
• Calculation of CGT  
• Property gains  
• Reliefs and exemptions | 19 February, 08.30 – 10.30 | £99  |
| Introduction to UK inheritance tax               | • Chargeable events  
• Lifetime tax  
• The death estate  
• Valuation of assets  
• Reliefs and exemptions | 05 March, 08.30 – 10.30 | £99  |
| Residence, domicile and the remittance basis     | • Statutory residence test  
• Types of domicile and the implications of residence and domicile rules  
• The basics of the remittance basis and its effects for clients with structures in C.I. | 21 March, 08.30 – 10.30 | £99  |
| Basic UK tax for fund administrators              | • Residence  
• Domicile  
• Remittance basis  
• The basics of:  
  o Income tax  
  o Capital Gains tax and  
  o Inheritance tax. | 05 December, 08.30 – 10.30 | £99  |

## 7b. Target Audience - Supervisor

<table>
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<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
<th>Cost</th>
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</table>
| UK income tax for offshore trustees               | • Revision of the basics of IT updated to FA17  
• Obligations of trustees versus beneficiaries  
• An understanding of UK income tax  
• Implications within fiduciary structures. | 19 March, 08.30 – 10.30 | £99  |
| UK capital gains tax for offshore trustees        | • Revision of the basics of CGT updated to FA17  
• Obligations of trustees versus beneficiaries  
• An understanding of UK capital gains tax  
• Implications within fiduciary structures. | 09 April, 08.30 – 10.30 | £99  |
| UK inheritance tax for offshore trustees          | • Revision of the basics of IHT updated to FA17  
• Obligations of trustees versus beneficiaries, an understanding of UK inheritance tax implications within fiduciary structures. | 16 April, 08.30 – 10.30 | £99  |
| Criminal Finance Act 2017                         | • What is the CFA 2017  
• What are the implications for the Channel Islands | 27 April, 08.30 – 09.30 | £65  |
| Overview of UK taxes for real estate              | • Stamp duty land tax  
• UK CGT on UK real estate  
• UK IHT implications for UK real estate  
• Commercial and residential | 02 May, 08.30 – 10.30 | £99  |
<table>
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<tr>
<th>Course Title</th>
<th>Course Outline</th>
<th>Date</th>
<th>Cost</th>
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</table>
| **Non-resident landlord scheme** | • Principles of UK income tax, how these apply to non-resident landlords  
• Deductibility of expenses, including the treatment of VAT  
• Capital allowances basics  
• Due dates for tax – and any differences with corporation tax; penalties for getting it wrong | 01 June, 08.30 – 10.30 | £99 |
| **VAT basics** | • Basics of VAT including:  
  o registration rules  
  o zero rated and exempt supplies  
  o VAT invoices  
  o Penalties for non-compliance  
• VAT on property including the option to tax, the capital goods scheme and imports and exports | 11 June, 08.30 – 10.30 | £99 |
| **Introduction to UK corporation tax** | • Corporation tax basics  
• Property income for company  
• Borrowing costs  
• Anti-avoidance rules around borrowing costs: corporate interest restriction, transfer pricing, thin capitalisation  
• Chargeable gains for companies  
• Losses | 15 June, 09.00 – 12.00 | £145 |
| **Finance Act update (JSCCA)** | • This session will cover the tax rules proposed by Finance Act 2018 most relevant to the Channel Islands.  
• These include the CGT rules around UK property – residential and commercial – as well as changes coming in for the taxation of non-resident landlord income to bring them in line with entities within the charge to UK corporation tax. | 21 June, 12.00 – 14.00 | £65 |
| **VAT for real estate** | • VAT on land and buildings  
  o Zero rated, exempt or standard rated VAT  
• Opt to tax | 25 June, 08.30 – 10.30 | £99 |
| **Stamp duty and stamp duty land tax** | • Stamp duty on the transfer of shares  
• Stamp duty land tax for both commercial and residential properties | 17 September, 08.30 – 09.30 | £65 |
| **Transfer pricing basics** | • The concepts of international trade between connected parties and the tax disputes this can lead to  
• Alternative cost structures available to multinationals to mitigate the issue | 11 October, 08.30 – 10.00 | £80 |
| **UK Capital gains tax on disposal of UK property** | • Revision of the basics of CGT  
• Residential versus commercial property  
• Enhancement expenditure  
• Part disposals  
• VAT implications on disposal  
• Reporting/payment dates. | 28 November, 08.30 – 10.30 | £99 |

**7c. Target Audience - Manager**

<table>
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<tr>
<th>Course Title</th>
<th>Course Outline</th>
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<th>Cost</th>
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</table>
| **VAT for real estate advanced** | • VAT on land and buildings and the option to tax  
• The capital goods scheme  
• Transfer of going concern | 09 July, 08.30 – 10.30 | £99 |
| **Tax on leases and lease premiums** | • Tax impact of a lease for the landlord of a UK property  
• Lease premiums. | 19 November, 08.30 – 10.30 | £99 |
| **UK tax relief on research and development** | • What is classed as research and development  
• Tax reliefs available and how to calculate. | 12 December, 08.30 – 10.30 | £99 |
Programme details

Presenters

The programme is presented by a range of BPP tutors.

Venue

All sessions will take place at BPP Professional Education, Whiteley Chambers, 39 Don Street, St Helier, Jersey, JE2 4TR.

Costs

Prices do not include GST. Those organisations or individuals who are not exempt from GST will pay an additional 5%.

Discount

For details of discounts available for multiple bookings please contact Jane Golding on 711836 or janegolding@bpp.com

How to book

Simply complete the booking form at the back of this brochure and forward to jerseyenquiries@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: jerseyenquiries@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
# BPP Booking form

<table>
<thead>
<tr>
<th>Personal details</th>
<th>Authorisation to invoice employer</th>
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<tbody>
<tr>
<td>Title</td>
<td>Date of Birth</td>
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<td>First Name</td>
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<td>Last Name</td>
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<td>Home Address</td>
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<td>Signature*</td>
<td>Authorising Signature*</td>
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*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.*

*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.*

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<th>Please circle as applicable below</th>
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<td>Self-funded</td>
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| | PO Number |
| | Accounts Payable Tel |
| | Accounts Payable Email |

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

(If yes, please arrive for the start of the first day of your course 15 minutes early to allow for the local site Health & Safety Officer to complete the necessary evacuation procedure and assessments with you.)

| Course details | | Start date | Price |
|----------------|------------------|
| Session | |
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| What other courses would you like to see? |

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Card holder’s address

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Security code | Valid from | Expiry date |

Send to [jerseyenquiries@bpp.com](mailto:jerseyenquiries@bpp.com) Tel +44 (0) 1534 711800