



BPP Professional Development 2017 Chronological Calendar

Professional Development Courses

January

Course Title	Date	Duration	Cost
UK Tax for UK real estate	17 January, 09.00 – 12.00	3 hours	£155.00
Technical update on IFRS 15; Revenue from contracts with customers	19 January, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00

February

Course Title	Date	Duration	Cost
IFRS 15 Revenue from contracts from customers (OCR Live)	2 February, 15.00 – 17.00 GMT	2 hours	£120.00
Time management	6 February, 12.00 – 14.00	2 hours	£99.00
Introduction to bookkeeping	6 – 7 February, 09.00 – 16.00	2 days (12 hours)	£299.00
Introduction to UK Income Tax for offshore trustees	7 February, 16.30 – 18.30	2 hours	£99.00
Investments for administrators	8 February, 12.00 – 14.00	2 hours	£99.00
Creating an exceptional team (OCR Live)	13 February, 15.00 – 17.00 GMT	2 hours	£120.00
Fiduciary Induction Programme	13 - 17 February, 09.00 – 16.00	5 days	£750.00
FRS 102, one year on	14 February, 12.00 – 14.00	2 hours	£99.00
Intermediate bookkeeping	15 – 16 February, 09.00 – 16.00	2 days (12 hours)	£350.00
Moving to FRS 102 1A; Technical and practical implications	16 February, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
The role of the manager	16 February, 16.30 – 18.30	2 hours	£99.00
Mindfulness Workshop	17 February, 11.00 – 14.00	3 hours	£125.00
VAT for administrators	21 February, 08.30 – 10.00	1.5 hours	£80.00
Investments for administrators (OCR Live)	23 February, 15.00 – 17.00 GMT	2 hours	£120.00

March

Course Title	Date	Duration	Cost
BVI and Cayman companies	2 March, 12.00 – 14.00	2 hours	£99.00
Managing pressure to prevent stress	6 March, 12.00 – 14.00	2 hours	£99.00
Roles and responsibilities of trustees (OCR Live)	8 March, 15.00 – 17.00 GMT	2 hours	£120.00
Accounting for financial instruments	14 March, 12.00 – 14.00	2 hours	£99.00
Types of trusts and relevant case law	16 March, 12.00 – 14.00	2 hours	£99.00
Incorporation of Jersey and BVI companies	17 March, 12.00 – 14.00	2 hours	£99.00
Introduction to UK Capital Gains Tax for offshore trustees	22 March, 16.30 – 18.30	2 hours	£99.00

IFRS 16; Leases	23 March, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Contributing to a team	27 March, 12.00 – 14.00	2 hours	£99.00
Effectively managing remote teams	28 March, 09.00 – 16.00	6 hours	£195.00
Introduction to UK Income Tax	28 March, 08.30 – 10.00	1.5 hours	£80.00
Corporate Governance and Risk Management for non-executive directors and audit committee members	28 March, 17.30 – 19.30	2 hours	£99.00
Building an effective board and assessing its effectiveness	29 March, 09.00 – 10.30	1.5 hours	£80.00
New developments in internal auditing	29 March, 11.00 – 14.00	3 hours	£150.00
Controls transformation	29 March, 15.00 – 17.00	2 hours	£99.00
April			
Course Title	Date	Duration	Cost
Motivating and engaging your team	4 April, 16.30 – 18.30	2 hours	£99.00
Effective minute writing (OCR Live)	5 April, 15.00 – 17.00 GMT	2 hours	£120.00
Blockchain Unchained: The Accountants' Guide to Distributed Ledger Technology and Cyber-security: what every auditor ought to know	27 April, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Comparison between Jersey and UK company law	28 April, 12.00 – 14.00	2 hours	£99.00
Managing stress (OCR Live)	28 April, 15.00 – 17.00 GMT	2 hours	£120.00
May			
Course Title	Date	Duration	Cost
FA 2017 Update	3 May, 11.30 – 13.30	2 hours	£99.00
Effective delegation	8 May, 16.30 – 18.30	2 hours	£99.00
Responding to change positively	10 May, 12.00 – 14.00	2 hours	£99.00
The role of the company secretary	18 May, 12.00 – 14.00	2 hours	£99.00
June			
Course Title	Date	Duration	Cost
What is a trust?	5 June, 12.00 – 14.00	2 hours	£99.00
IFRS 9 Financial instruments (OCR Live)	5 June, 15.00 – 17.00 GMT	2 hours	£120.00
Conducting an appraisal	5 June, 16.30 – 18.30	2 hours	£99.00

Introduction to UK Capital Gains Tax	6 June, 08.30 – 10.00	1.5 hours	£80.00
Developing resilience (OCR Live)	6 June, 15.00 – 17.00 GMT	2 hours	£120.00
Revenue recognition	7 June, 12.00 – 14.00	2 hours	£99.00
Building rapport	7 June, 12.00 – 14.00	2 hours	£99.00
Foundations	8 June, 12.00 – 14.00	2 hours	£99.00
IFRS 9; Financial instruments	8 June, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Creating an exceptional Team	14 June, 16.30 – 18.30	2 hours	£99.00
Minute writing	16 June, 12.00 – 14.00	2 hours	£99.00
Transfer pricing	20 June, 12.00 – 14.00	2 hours	£99.00
Limited partnerships	21 June, 12.00 – 14.00	2 hours	£99.00
What is a company? (OCR Live)	21 June, 15.00 – 17.00 GMT	2 hours	£120.00
IAS 38; Intangible assets	22 June, 12.00 – 14.00	2 hours	£99.00
Finance Act 2017 update	22 June, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Building a personal brand	23 June, 12.00 – 14.00	2 hours	£99.00

July

Course Title	Date	Duration	Cost
How to handle angry clients	3 July, 12.00 – 14.00	2 hours	£99.00
Time management (OCR Live)	5 July, 15.00 – 17.00 GMT	2 hours	£120.00
Roles and responsibilities of trustees	7 July, 12.00 – 14.00	2 hours	£99.00
Administration for non-administrators	17 July, 12.00 – 14.00	2 hours	£99.00
International anti-avoidance tax basics	18 July, 11.30 – 13.30	2 hours	£99.00
Managing pressure in your team	20 July, 16.30 – 18.30	2 hours	£99.00
Regulated financial services businesses – How to improve corporate governance?	21 July, 12.00 – 14.00	2 hours	£99.00
What is corporate governance and why is it important?	27 July, 16.30 – 18.30	2 hours	£99.00
IFRS refresher	27 July, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Intermediate bookkeeping	31 July – 1 August, 09.00 – 16.00	2 days (12 hours)	£350.00

August

Course Title	Date	Duration	Cost
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Introduction to UK Inheritance Tax	14 August, 08.30 – 10.00	1.5 hours	£80.00
Introduction to UK Inheritance Tax for offshore trustees	22 August, 16.30 – 18.30	2 hours	£99.00
Introduction to bookkeeping	24 – 25 August, 09.00 – 16.00	12 hours	£299.00

September

Course Title	Date	Duration	Cost
Communication – right first time	5 September, 12.00 – 14.00	2 hours	£99.00
What is a trust? (OCR Live)	11 September, 15.00 – 17.00 GMT	2 hours	£120.00
Charitable trusts, foundations and other structures	12 September, 12.00 – 13.30	1.5 hours	£80.00
What is a company?	12 September, 12.00 – 14.00	2 hours	£99.00
The emotionally intelligent manager	13 September, 16.30 – 18.30	2 hours	£99.00
Reviewing company accounts	14 September, 12.00 – 14.00	2 hours	£99.00
The role of the manager (OCR Live)	15 September, 15.00 – 17.00 GMT	2 hours	£120.00
Fiduciary Induction Programme	18 – 22 September. 09.00 – 16.00	5 days	£750.00
Motivating and engaging your team (OCR Live)	19 September, 15.00 – 17.00 GMT	2 hours	£120.00
Governance in unlisted and private companies	21 September, 12.00 – 14.00	2 hours	£99.00
Incorporation of Jersey and BVI companies	26 September, 12.00 – 14.00	2 hours	£99.00
FRS102; one year on	28 September, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00

October

Course Title	Date	Duration	Cost
IFRS 13 Fair value measurement (OCR Live)	3 October, 15.00 – 17.00 GMT	2 hours	£120.00
UK Tax for fund administrators Cancelled	5 October, 16.30 – 18.30	2 hours	£99.00
Holding difficult conversations	6 October, 12.00 – 14.00	2 hours	£99.00
Fiduciary decision making	10 October, 12.00 – 14.00	2 hours	£99.00
Emotional intelligence	11 October, 12.00 – 14.00	2 hours	£99.00
Finance for non-finance managers	12 October, 09.00 – 16.00	6 hours	£195.00
Duties and responsibilities of a Jersey director	13 October, 12.00 – 14.00	2 hours	£99.00
Consolidation; keeping you up to date	19 October, 12.00 – 14.00	2 hours	£99.00
The use of trusts, companies and foundations (OCR Live)	23 October, 15.00 – 17.00 GMT	2 hours	£120.00
Dealing with difficult situations	31 October, 16.30 – 18.30	2 hours	£99.00

November

Course Title	Date	Duration	Cost
Constructive conflict management	7 November, 12.00 – 14.00	2 hours	£99.00
IFRS 16 Leases (OCR Live)	9 November, 15.00 – 17.00 GMT	2 hours	£120.00
The use of trusts, companies and foundations	10 November, 12.00 – 14.00	2 hours	£99.00
IFRS refresher	13 November, 12.00 – 14.00	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Coaching to develop your team	13 November, 16.30 – 18.30	2 hours	£99.00
Practical update on IFRS15; Revenue from contracts with customers	16 November, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
What's expected of a regulated trust company business and their employees	17 November, 12.00 – 14.00	2 hours	£99.00
Fiduciary decision making (OCR Live)	22 November, 15.00 – 17.00 GMT	2 hours	£120.00
Accounting for foreign transactions and foreign subsidiaries	23 November, 12.00 – 14.00	2 hours	£99.00
Introduction to networking	27 November, 12.00 – 14.00	2 hours	£99.00

December

Course Title	Date	Duration	Cost
UK Stamp Taxes	5 December, 08.30 – 09.30	1 hour	£80.00
Trust deeds	5 December, 12.00 – 14.00	2 hours	£99.00
Reviewing trust accounts	6 December, 12.00 – 14.00	2 hours	£99.00
Incorporation and dissolution of a company	7 December, 12.00 – 14.00	2 hours	£99.00
Leading change successfully	7 December, 16.30 – 18.30	2 hours	£99.00
Accounting year in review	7 December, 16.30 – 18.30	2 hours	JSCCA members: Free JSCCA student members: Free Non JSCCA members: £65.00
Developing resilience	11 December, 12.00 – 14.00	2 hours	£99.00
Understanding residence, domicile and the remittance basis	12 December, 11.30 – 13.30	2 hours	£99.00

UK Tax for UK Real Estate

17 January, 09.00 – 12.00

- Stamp duty land tax
- UK CGT on UK real estate
- UK IHT implications for UK real estate
- Commercial and residential

Technical update on IFRS 15; Revenue from contracts with customers

19 January, 16.30 – 18.30

IFRS 15 Revenue from contracts from customers (OCR Live)

2 February, 15.00 – 17.00 GMT

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.

As a result of this session you will:

- Gain an understanding of the core principle of IFRS 15 using its 5 step framework
- 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)
- Gain confidence across the disclosure requirements, performance obligations, and key judgements and estimates.

Time management

6 February, 12.00 – 14.00

- During this course delegates will identify their personal "time- stealers". Once identified, they can 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

Introduction to bookkeeping

6 – 7 February, 09.00 – 16.00

- Provides a foundation in manual bookkeeping skills
- Aimed at people in small businesses; starting to work in the finance industry or are looking to acquire new skills to get into the workplace

Introduction to UK Income Tax for Offshore Trustees

7 February, 16.30 – 18.30

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|--------------------------|---------------------|
| • Residence and domicile | • Property income |
| • The remittance basis | • Offshore trustees |
| • Calculating income tax | |

Investments for Administrators

8 February, 12.00 – 14.00

- | | |
|----------------------------------|----------------------------------------|
| • What is a share? | • What are funds? |
| • Why chose a share? | • Why chose a fund? |
| • Dividends | • NAV |
| • Market volatility of shares | • Risk and return |
| • What is a bond? | • Portfolio objectives and composition |
| • Why chose a bond? | • Other assets |
| • Par, coupon, yield to maturity | |

Creating an exceptional team (OCR Live)

13 February, 15.00 – 17.00 GMT

- 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.

Fiduciary Induction Programme

13 – 17 February, 09.00 – 16.00

Day 1

- Offshore Business Environment
- Anti Money Laundering
- Office Etiquette
- Delegation
- Communications

Day 2

- Motivation
- Time Management
- Business Writing

Day 3

- What is a company?
- Parties to a company
- Company incorporation
- Registers
- What is a share?
- Share certificates

Day 4

- What is a company continued.....
- Annual returns
- Dividends
- Meetings
- What is a trust?
- Why set up a trust?
- The history of trusts
- The parties to a trust
- Types of trusts used in offshore jurisdictions

Day 5

- What is a trust continued.....
- Trust documentation
- What are minutes?
- Why do service providers produce minutes?
- Offshore Trust minutes
- Shareholders meetings

FRS 102, one year on

14 February, 12.00 – 14.00

- Provides an overview of FRS 102 and how companies have dealt with the changeover over the last 12 months

Intermediate bookkeeping

15 – 16 February, 09.00 – 16.00

- Focuses on developing bookkeeping and basic accounting skills, including double entry bookkeeping
- Includes control accounts and progresses up to preparation of final accounts
- This level is suited for people who have completed the introductory level, or people already working in finance

Moving to FRS 102 1A; Technical and practical implications

16 February, 16.30 – 18.30

The Role of the Manager

16 February, 16.30 – 18.30

- 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

Mindfulness Workshop

17 February, 11.00 – 14.00

Dr Agostinis will be sharing his knowledge into Mindfulness and demonstrating how it offers:

- Improved grades on exams
- More effective stress management
- Enhanced and sustained attention span
- Improved physical and psychological recovery from stress
- Increased performance and wellbeing

VAT for administrators

21 February, 08.30 – 10.00

- This course will cover the basics of VAT including registration rules, zero rated and exempt supplies, VAT invoices and penalties for non-compliance
- VAT on property including the option to tax, the capital goods scheme and imports and exports

Investments for administrators (OCR Live)

23 February, 15.00 – 17.00 GMT

- What is a share?
- Why chose a share?
- Dividends
- Market volatility of shares
- What is a bond?
- Why chose a bond?
- Par, coupon, yield to maturity
- What are funds?
- Why chose a fund?
- NAV
- Risk and return
- Portfolio objectives
- Portfolio composition

BVI and Cayman companies

2 March, 12.00 – 14.00

- Different types of company available in BVI and Cayman
- Restrictions on the use of companies
- Reserved and shelf companies: advantages and drawbacks
- Incorporation of Companies including constitutional documents
- Registered agents
- Share capital including bearer shares
- Directors meetings and duties
- Members meetings
- Registered office and record keeping
- Statutory returns
- Records of transactions and Financial statements
- End of the road

Managing pressure to prevent stress

6 March, 12.00 – 14.00

- 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

Roles and responsibilities of trustees (OCR Live)

8 March, 15.00 – 17.00 GMT

- Powers and duties of trustees
- Basic trustee duties: Not to profit: Keech v Sandford
- The duty of care
- Beneficiaries: rights and difficulties
- General trustee investment issues: preserve and enhance
- Underlying companies: Bartlett and trustee duties
- Shams: types, transfers, settlor problems, the effect of a trust being declared a sham
- How to avoid Shams
- Trustee duties
- Trustee meetings
- Trust records

Accounting for financial instruments

14 March, 12.00 – 14.00

- Provides an overview of the changes from IAS 39 to IFRS 9 including IFRS 9's new impairment loss methodology with some detailed examples to help comprehend the extent of the changes
- Aimed at qualified accountants or students who have completed the majority of their ACCA/ICAEW exams

Types of trusts and relevant case law

16 March, 12.00 – 14.00

- Discretionary Trusts
- Why are discretionary trusts used?
- Settlor reserved power Trust
- Why are Settlor Reserved Power trusts used?
- Fixed interest Trust
- Why are Fixed Interest trusts used?
- Bare Trust
- Why are Bare trusts used?
- Purpose Trusts
- Why are Purpose trusts used?
- Case law – Hastings Bass update
- Case law – Trusts and divorce
- Case law – Trusts set aside due to mistake
- Case law – Trust protectors

Incorporation of Jersey and BVI companies

17 March, 12.00 – 14.00

- What is a company?
- Types of Jersey Company
- Incorporating a company in Jersey
- Choosing a name
- Tort of passing off
- Memorandum and articles
- Effect of the articles
- Registry forms
- Types of company in BVI
- Registering and incorporating a company in BVI
- Documents and records
- Bearer shares

Introduction to UK Capital Gains Tax for Offshore Trustees

22 March, 16.30 – 18.30

- Revision of basic principles
- Non-UK resident trusts
- ATED / ARPT charge
- CGT charge for non-residents

IFRS 16; Leases

23 March, 16.30 – 18.30

Contributing to a team

27 March, 12.00 – 14.00

- Define the characteristics of effective teamwork
- List and demonstrate the attributes of a good team player
- Identify the key team roles and the characteristics of each
- Learn how to develop a group of individuals into a high performing team

Effectively managing remote teams

28 March, 09.00 – 16.00

- Define effective leadership behaviours of remote teams
- Identify what remote team members need and expect from team leaders
- Use a combination of communication channels and methods to support effective team working
- Create and maintain motivation and team spirit within remote working environments
- Use a number of techniques to manage and maximize the performance of remote team members

Introduction to UK Income Tax

28 March, 08.30 – 10.00

- UK residence and domicile
- Basic principles of UK Income Tax
- Delegates will learn how residence and domicile affect an individual's exposure to this type of tax.
- The course will also look at when an offshore trust or company may fall within the charge of UK Income Tax

Corporate Governance and Risk Management for non-executive directors and audit committee members

28 March, 17.30 – 19.30

Corporate governance and risk management are essential areas for both Executive and Non-Executive Directors to be fully informed about. This session will cover the following areas:

- Recent developments in corporate governance
- The four corner stones of effective governance
- Embedding a governance culture into your organisation
- The importance of risk management - both to safeguard the business and as a value driver
- The critical elements of effective risk management, including key catalysts
- Assessing the effectiveness of risk management within your own organisation

Building an effective board and assessing its effectiveness

29 March, 09.00 – 10.30

This briefing session offers new and existing Board members the opportunity to ensure that their Board operates in an appropriate and effective manner, thereby adding value. Areas to be covered include:

- Roles and responsibilities of Board members
- The distinction between executive and non-executive Directors
- What makes a Board effective?
- Building an effective governance structure within your organization
- How effective governance can contribute to value creation
- Managing engagement with all key stakeholders
- Reviewing Board effectiveness – tools and techniques

New developments in internal auditing

29 March, 11.00 – 14.00

To continue to provide value to their organisations, internal auditors need to be abreast of good practices. This session will cover the following areas:

- New and emerging requirements for the internal auditor including updates on governance related issues
- Assessing the level of risk maturity of your organisation through auditing the risk management processes
- Adopting a 'real' risk based approach to your audit work
- Understanding how to audit the 'intangibles' within your organisation
- Making a real input to change projects within your organisation
- Providing greater assurance with leaner resources

Controls transformation

29 March, 15.00 – 17.00

Many organisations are operating today with a hierarchy of controls that belong to yesterday. Often controls and other procedures are carried out because 'that's the way we've always done things.' This session will cover:

- The need for controls transformation
- Understanding the principles of controls transformation
- Understanding risk - the key starting point for controls transformation
- Assessing the effectiveness of the current controls hierarchy
- Using controls transformation as a competitive advantage

Motivating and Engaging your Team

4 April, 16.30 – 18.30

- 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

Effective minute writing (OCR Live)

5 April, 15.00 – 17.00 GMT

- | | |
|-----------------------------------------------|------------------------------------|
| • What are minutes? | • Litigation and disputes |
| • Contents | • Protectors |
| • Typical wording | • Offshore Company minutes |
| • Why do service providers produce minutes? | • Why do Companies produce minutes |
| • Effective record keeping and administration | • Types of meetings |
| • Offshore Trust minutes | • Litigation and disputes |
| • Why do Trustees produce minutes | • Written resolution vs minutes |

Blockchain Unchained: The Accountants' Guide to Distributed Ledger Technology and Cyber-security: what every auditor ought to know

27 April, 16.30 – 18.30

Comparison between Jersey and UK company law

28 April, 12.00 – 14.00

- Company formation
- Ultimate beneficial owners
- Corporate directors
- Members
- Authorised share capital
- Company filings
- Accounts
- Annual General Meetings
- Company dissolution

Managing stress (OCR Live)

28 April, 15.00 – 17.00 GMT

- 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

FA 2017 Update

3 May, 11.30 – 13.30

- This course will cover the changes in the latest budget to the following areas: business tax, corporate tax, employee tax, VAT, and capital and stamp taxes

Effective delegation

8 May, 16.30 – 18.30

- 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

Responding to change positively

10 May, 12.00 – 14.00

- Identify and understand resistance to change
- Plan and prepare action plans for successfully implementing change.

The role of the company secretary

18 May, 12.00 – 14.00

- 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

What is a trust?

5 June, 12.00 – 14.00

- What is a Trust?
- Why set up a trust?
- The history of Trusts
- 3 Certainties
- How is a Trust created?
- Perpetuity
- Who are the parties to a trust?
- Settlers and their role
- Beneficiaries and their interests and rights
- Trustees and their duties and powers
- Protectors
- Void and Voidable trusts
- Types of trusts

IFRS 9 Financial instruments (OCR Live)

5 June, 15.00 – 17.00 GMT

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.

Conducting an Appraisal

5 June, 16.30 – 18.30

- Successful organisations require effective people, with clear objectives aligned to organisational goals. This requires effective performance management
- During this course delegates will develop and practice the essential skills required to conduct a constructive appraisal in the context of performance management

Introduction to UK Capital Gains Tax (CGT)

6 June, 08.30 – 10.00

- UK residence and domicile for CGT
- CGT basic principles
- CGT basics for real estate

Developing resilience (OCR Live)

6 June, 15.00 – 17.00 GMT

- 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

Revenue recognition

7 June, 12.00 – 14.00

- Keep up to date with the new Revenue standard. The move from IAS 18 to IFRS 15 will be significant in your financial statements
- Aimed at qualified accountants

Building rapport

7 June, 12.00 – 14.00

- Define rapport and the different levels
- Recognise the behavioural preferences of others
- Techniques to adapt your behaviour and develop rapport
- Putting the theory into practice

Foundations

8 June, 12.00 – 14.00

- | | |
|--------------------------|---------------------------------|
| • What is a Foundation? | • Incorporation of a Foundation |
| • Origins of Foundations | • Entities involved |
| • Jersey Foundations | • Operating the Foundation |
| • Ultra Vires | • Important cases |
| • Uses of a Foundation | • Minutes |

IFRS 9; Financial instruments

8 June, 16.30 – 18.30

Creating an Exceptional Team

14 June, 16.30 – 18.30

- 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

Minute writing

16 June, 12.00 – 14.00

- What are minutes?
- Why do service providers produce minutes?
- Offshore Trust minutes
- Offshore Company minutes

Transfer Pricing

20 June, 12.00 – 14.00

- This session will introduce the concepts of international trade between connected parties, the tax disputes this can lead to and the alternative cost structures available to multinationals to mitigate the issue

Limited partnerships

21 June, 12.00 – 14.00

- | | |
|------------------------|--------------------------------|
| • General partnerships | • Incorporation of the GP |
| • Limited partnerships | • Uses of Limited partnerships |
| • The partners | • New varieties |
| • Formation of an LP | • End of the road |

What is a company? (OCR Live)

21 June, 15.00 – 17.00 GMT

- | | |
|--------------------------------------------------------|-------------------------|
| • What is a company? | • Types of Companies |
| • Separate legal personality | • Company incorporation |
| • Veil of incorporation | • Registers |
| • Limited liability | • Secretary |
| • Exercise / Advantages and disadvantages of companies | • Members |
| • Characteristics of a Company | • Directors |
| • Members / shareholders | • What is a share? |
| • Directors | • Share certificates |
| • Secretary | • Dividends |
| • Annual Returns | • Transferring shares |
| | • Registered Office |

IAS 38; Intangible assets

22 June, 12.00 – 14.00

- A revision of IAS 38 intangible assets, when to capitalise and when not to, and how to deal with an acquisition of an underlying Company when they hold a number of intangible assets
- Aimed at students currently doing accounting exams/qualified accountants

Finance Act 2017 update

22 June, 16.30 – 18.30

Building a personal brand

23 June, 12.00 – 14.00

- Define the term personal brand
- Recognise the impact your personal brand can have on your organisation's brand
- Take steps to start creating your own personal brand

How to handle angry clients

3 July, 12.00 – 14.00

- Determining the cause of a customer's anger
- Methods of diffusing anger
- Taking steps to deliver an acceptable solution

Time management (OCR Live)

5 July, 15.00 – 17.00 GMT

- 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.

Roles and responsibilities of trustees

7 July, 12.00 – 14.00

- | | |
|-----------------------------------------------------------|------------------------------------------------------------------------------------------|
| • Powers and duties of trustees | • Shams: types, transfers, settlor problems, the effect of a trust being declared a sham |
| • Basic trustee duties: Not to profit: Keech v Sandford | • How to avoid Shams |
| • The duty of care | • Trustee duties |
| • Beneficiaries: rights and difficulties | • Trustee meetings |
| • General trustee investment issues: preserve and enhance | • Trust records |
| • Underlying companies: Bartlett and trustee duties | |

Administration for non-administrators

17 July, 12.00 – 14.00

- Offshore jurisdictions and onshore offshore jurisdictions
- Why are offshore and onshore offshore jurisdictions used?
- Regulation and legislation
- Entities used
- What is administration?
- Income vs wealth generation
- Accounts and reporting
- Pressure points

International Anti-avoidance Tax Basics

18 July, 11.30 – 13.30

- This course will cover a selection of significant anti-avoidance rules, including controlled foreign companies, worldwide debt cap, thin capitalisation and close companies
- Basics of transfer pricing will also be included

Managing pressure in your team

20 July, 16.30 – 18.30

- 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

Regulated financial services businesses – How to improve corporate governance?

21 July, 12.00 – 14.00

- Governance and management roles
- Role of the board: what not to overlook
- Board committees
- Internal control, culture and procedures
- Risk management: is it just AML / CFT risks

What is corporate governance and why is it important?

27 July, 16.30 – 18.30

- Origins and principles of Governance
- Governance / Management?
- The agency problem
- An effective board
- NEDS
- Division of power: CEO / Chairman
- Internal control

IFRS refresher

27 July, 16.30 – 18.30

Intermediate bookkeeping

31 July – 1 August, 09.00 – 16.00

- Focuses on developing bookkeeping and basic accounting skills, including double entry bookkeeping
- Includes control accounts and progresses up to preparation of final accounts
- This level is suited for people who have completed the introductory level, or people already working in finance

Introduction to UK Inheritance Tax

14 August, 08.30 – 10.00

- UK IHT implications for residence and domicile
- UK IHT basic principles
- PETs / CLTs

Introduction to UK Inheritance Tax for Offshore Trustees

22 August, 16.30 – 18.30

- Basic principles
- Occasions of charge for trusts
- Qualifying interest in possession trusts
- Relevant property trusts
- Pitfalls and traps
- Reporting requirements
- Proposed future simplifications

Introduction to bookkeeping

24 – 25 August, 09.00 – 16.00

- Provides a foundation in manual bookkeeping skills
- Aimed at people in small businesses; starting to work in the finance industry or are looking to acquire new skills to get into the workplace

Communication – right first time

5 September, 12.00 – 14.00

- 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

What is a trust? (OCR Live)

11 September, 15.00 – 17.00 GMT

- 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

Charitable trusts, foundations and other structures

12 September, 12.00 – 13.30

- What is charitable?
- Charitable Vehicles or “entities”
- Legal definition
- UK Charities Act 2006
- Jersey still common law only?
- New Jersey Law 2014
- Charitable trusts
- What is a Foundation?
- Origins
- Uses of Jersey Foundations
- Incorporation & operation of a Foundation
- Basic Taxation issues

What is a company?

12 September, 12.00 – 14.00

- What is a company?
- Separate legal personality
- Veil of incorporation
- Limited liability
- Characteristics of a Company
- Members / shareholders
- Directors
- Secretary
- Annual Returns
- Types of Companies
- Company incorporation
- Registers
- What is a share?
- Share certificates
- Dividends
- Transferring shares
- Registered Office

The Emotionally Intelligent Manager

13 September, 16.30 – 18.30

- 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

Reviewing company accounts

14 September, 12.00 – 14.00

- This session gives delegates the resources to perform a full review of a set of financial statements
- Delegates will become familiar with Ratio analysis and create a checklist they can use in a practical way to ensure their reviews are complete and accurate
- Aimed at book keepers/students currently studying accounting

The role of the manager (OCR Live)

15 September, 15.00 – 17.00 GMT

- 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.

Fiduciary Induction Programme

18 – 22 September, 09.00 – 16.00

Day 1

- Offshore Business Environment
- Anti Money Laundering
- Office Etiquette
- Delegation
- Communications

Day 2

- Motivation
- Time Management
- Business Writing

Day 3

- What is a company?
- Parties to a company
- Company incorporation
- Registers
- What is a share?
- Share certificates

Day 4

- What is a company continued.....
- Annual returns
- Dividends
- Meetings
- What is a trust?
- Why set up a trust?
- The history of trusts
- The parties to a trust
- Types of trusts used in offshore jurisdictions

Day 5

- What is a trust continued.....
- Trust documentation
- What are minutes?
- Why do service providers produce minutes?
- Offshore Trust minutes
- Shareholders meetings

Motivating and engaging your team (OCR Live)

19 September, 15.00 – 17.00 GMT

- 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.

Governance in unlisted and private companies

21 September, 12.00 - 14.00

- What is Corporate Governance?
- The governance regime for listed companies
- The importance of private and unlisted companies
- What does not apply to these companies?
- The importance of governance in these companies
- The effective board
- Incentivise the board
- Relationships between key stakeholders
- Setting and monitoring company objectives: internal control
- Practical considerations

BVI and Cayman companies

26 September, 12.00 – 14.00

- Different types of company available in BVI and Cayman
- Restrictions on the use of companies
- Reserved and shelf companies: advantages and drawbacks
- Incorporation of Companies including constitutional documents
- Registered agents
- Share capital including bearer shares
- Directors meetings and duties
- Members meetings
- Registered office and record keeping
- Statutory returns
- Records of transactions and Financial statements
- End of the road

IFRS 13 Fair value measurement (OCR Live)

3 October, 15.00 – 17.00 GMT

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.

As a result of this session you will:

- Learn about IFRS 13's fair value hierarchy and how it has enhanced the comparability and consistency within Financial Reporting
- Gain confidence in creating disclosures which comply with IFRS 13
- Gain an understanding of which standards are exempt from following IFRS 13 and why, for example IFRS 2 *Share-based payments* and IAS 2 *Inventories*.

Holding difficult conversations

6 October, 12.00 – 14.00

- Better understand the motivation of difficult people
- Identify different personalities and behaviour patterns
- Understand how you respond to conflict
- Follow a simple structure to handle difficult conversations

Fiduciary decision making

10 October, 12.00 – 14.00

- What is expected of a signatory?
- Knowing your client and decision making
- Risk and decision making
- Tax and decision making
- Investments and decision making
- Accounts and decision making

Emotional intelligence

11 October, 12.00 – 14.00

- Define emotional intelligence
- The key characteristics of emotional intelligence
- Identify how emotions can affect performance at work
- Describe key techniques to control your emotions to respond appropriately

Finance for non-finance managers

12 October, 09.00 – 16.00

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
- The difference between capital and revenue expenditure
- Standard accounting adjustments
- How to interpret a set of financial statements
- The concepts of liquidity
- The difference between financial accounting and management accounting
- The concepts and methods of budgeting, forecasting and re-forecasting
- The use of budgeting and management accounting within performance management
- The techniques used to prepare budgets
- Classifications used in the analysis of costs including by function, direct and indirect, fixed and variable
- The importance of capital investment planning and control
- How to define and distinguish between capital and revenue expenditure

Duties and responsibilities of a Jersey director

13 October, 12.00 – 14.00

- 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

Consolidation; keeping you up to date

19 October, 12.00 – 14.00

- An update to IFRS 10; understanding the main concepts of control and when to consolidate
- Determining what an investment entity is and when a company can take the consolidation exemption
- Aimed at qualified accountants

The use of trusts, companies and foundations (OCR Live)

23 October, 15.00 – 17.00 GMT

- What is a foundation, compare to trust and company
- Uses of foundations
- Why trusts are used offshore
- Various types of trust including: Discretionary, Accumulation and Maintenance, Fixed interest
- Types of trusts: Asset protection trusts
- Types of trusts: Charitable trusts
- Types of trusts: Offshore purpose trusts

Dealing with Difficult Situations

31 October, 16.30 – 18.30

- 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

Constructive Conflict management

7 November, 12.00 – 14.00

- 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

IFRS 16 Leases (OCR Live)

9 November, 15.00 – 17.00 GMT

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 *Revenue from Contracts with customers*.

As a result of this session you will:

- Understand the reasons for this change
- Learn about the key changes from IAS 17 and the ultimate implications the changes will have on the Financial Statements including disclosures
- Understand the impact the changes will have on debt covenants, financial gearing and a company's cost of borrowing.

The use of trusts, companies and foundations

10 November, 12.00 – 14.00

- What is a foundation, compare to trust and company
- Uses of foundations
- Why trusts are used offshore
- Various types of trust including: Discretionary, Accumulation and Maintenance, Fixed interest
- Types of trusts: Asset protection trusts
- Types of trusts: Charitable trusts
- Types of trusts: Offshore purpose trusts

IFRS refresher

13 November, 12.00 – 14.00

Coaching to Develop your Team

13 November, 16.30 – 18.30

- 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

Practical update on IFRS15; Revenue from contracts with customers

16 November, 16.30 – 18.30

What's expected of a regulated trust company business and their employees

17 November, 12.00 – 14.00

- Acting in the best interests of our clients
- Risk management
- Competency of employees
- Records
- Dealing with the commission
- CDD / AML / Policies and procedures

Fiduciary decision making (OCR Live)

22 November, 15.00 – 17.00 GMT

- | | |
|-------------------------------------------|------------------------------------------|
| • What is expected of a signatory? | • What tax matters need to be considered |
| • Knowing your client and decision making | • Investments and decision making |
| • Risk awareness | • Advisory and execution only portfolios |
| • What is risk? | • Types of investments |
| • Types of risk | • Accounts and decision making |
| • Making decisions to mitigate risk | • What to review in the accounts |
| • Tax awareness | • Beware |

Accounting for foreign transactions and foreign subsidiaries

23 November, 12.00 – 14.00

- Provide an understanding of how to deal with foreign transactions using IAS 21
- Consolidate a foreign subsidiary following the IAS 21 principles
- Aimed at students currently studying/qualified accountants

Introduction to networking

27 November, 12.00 – 14.00

- Prepare for networking events
- Create that powerful 'first impression'
- Learn to remember people's names
- How to join and leave groups with ease
- Make yourself memorable

UK Stamp Taxes

5 December, 08.30 – 09.30

- This course will cover stamp duty on the transfer of shares as well as stamp duty land tax for both commercial and residential properties

Trust deeds

5 December, 12.00 – 14.00

- Creation and structure of the deed
- Trustee exoneration: indemnities, effect of West v Lazard Bros
- Bartlett clauses
- Settlor and potential issues with trustees
- Letters of wishes/memorandum of wishes
- Protectors: description and powers, including various cases
- Beneficiaries right to vary: Saunders v Vautier

Reviewing trust accounts

6 December, 12.00 – 14.00

- Understanding different types of trust from an accounting perspective
- The format of trust accounts
- Income versus Capital
- How to account for different types of trust
- Practical case studies

Incorporation and dissolution of a company

7 December, 12.00 – 14.00

- 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

Leading Change Successfully

7 December, 16.30 – 18.30

- 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

Accounting year in review

7 December, 16.30 – 18.30

Developing resilience

11 December, 12.00 – 14.00

- 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

Understanding Residence, Domicile and the Remittance Basis

12 December, 11.30 – 13.30

- Statutory residence test
- Domicile
- Implications of residence and domicile
- The remittance basis