Since our last edition a lot has been going on with regional meetings and our new websites but at this time of the year all our attention turns to our annual conference, it is our flagship event.

It’s also the only opportunity we all have to meet up in person in one grand MiP forum (time for myself and Ian Ross to dust off our kilts and get ready for the gala dinner, for those of you who promised they would don highland dress this year - we remember who you are)!

Before I tell you about the annual MiP event, I wanted to make you aware that as a Member in Practice you are entitled to have your name listed on the ‘find an accountant’ section of www.cimaglobal.com however we are aware that some people are not visible on the database. If you are not visible but would like your details to be visible please visit www.cimaglobal.com/Members/Find-a-practising-accountant/ and follow the instructions.

This year’s event in Heythrop Park (20 and 21 June) will be another great event. We have a first class line up of speakers dealing with technical updates, sales and marketing motivation talks. Have a look at the programme and you will see what I mean. Every year I have gone back to my practice armed with a few gems of insight that have helped me along.

There is also a wide array of exhibitors this year; our main sponsors are MYFIRMS APP XERO. MYFIRMS APP create an app especially for your firm, a new and innovative way to attract customers, XERO is a leader in cloud accounting solutions. We also have: Swat UK (CPD provider); Catax Solutions (capital allowance specialists); BTC Software (tax software); Oc rex, ( bank statement recognition software); PIP Professional Fee Protection (tax investigation insurance); Jumpstart (R&D tax credits); ECS Insurance Brokers; The Association of Taxation Technicians; Networking Skills and Freedom Search (Google Adwords specialists).

On top of that we have sponsored room breakout slots by: Zenith (tax advisory services); Walkin CRM (marketing and software specialists) and Payment Sense(merchant service provider). These are all MiP specific; I am pleased to say that I already use several of these sponsors products and services so I know how good they are. Although I use the products there are also some sponsors I haven’t met and I look forward to meeting them, face to face, for the first time at Heythrop.

Remember that these firms were not just selected as presenters and sponsors but as partners. They have products and services that we can use, and products and services which are beneficial to us and our clients. If you have not been before and are thinking about attending.

We are really keen to bring the work we have done on the area meetings and our new marketing initiatives into conference. This year we will have a room dedicated to the regions and the new initiatives. Hopefully you will meet other MiPs for your own area and get an opportunity to network with them.

There are all sorts of specialists within the MiP community and if you cannot find a MiP to help you, we have our partner firms that could help.

"We are working towards a world where all the MiPs contribute to marketing and sharing in UK wide business opportunities.

Stephen Milne
Chairman, MiP Panel
Welcome to issue 4 of In Touch In Tune, bringing you the latest developments in CIMA services, procedures and regulation while also packed full of useful tips on how to run and market your business.

Don’t forget to check out the up and coming events if you have any questions or articles you would like me to consider including in the next issue you can contact me on 020 8849 2207 or georgia.stephanou@cimaglobal.com.

If Stephen has not convinced you to attend the annual MiP conference, I would like to add that I attended last year and although I am not a MiP, I left with more knowledge and tips for personal development than ever before. The speakers were all top notch and knew their topics. I am looking forward to the the gala dinner it’s the perfect way to unwind with likeminded people.

You have seen our pictures so please feel free to speak to me and Stephen at the conference. I look forward to meeting you all.

Georgia Stephanou
Editor, In Touch In Tune

Editors note
## CIMA 2014 Members in Practice Annual Conference Schedule

### Day 1 – Friday 20 June 2014

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Event</th>
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<tbody>
<tr>
<td>8.30am</td>
<td>Lobby</td>
<td>Registration and coffee</td>
</tr>
<tr>
<td>9.15am</td>
<td>Main Theatre</td>
<td>Welcome to the conference</td>
</tr>
<tr>
<td>9.50am</td>
<td>Main Theatre</td>
<td>Steve McDermott - The building blocks of success - The four things every person, team and organisation needs if they are to grow and prosper</td>
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<tr>
<td>10.50am</td>
<td>Lobby</td>
<td>Refreshments and networking</td>
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<tr>
<td>11.10am</td>
<td>Main Theatre</td>
<td>Richard Mullender – Communication secrets of a hostage negotiator</td>
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<tr>
<td>12.15am</td>
<td>Breakout 1</td>
<td>Choose from:</td>
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<tr>
<td></td>
<td>Main Theatre</td>
<td>The panel and guests - MiPs are doing it for themselves</td>
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<tr>
<td></td>
<td>Zenith Tax room</td>
<td>Zenith Tax Sponsor talk</td>
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<tr>
<td></td>
<td>Walkin CRM room</td>
<td>Walkin CRM Sponsor talk</td>
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<td>Payment Sense room</td>
<td>Information room</td>
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<tr>
<td>1.15pm</td>
<td>Lobby</td>
<td>Lunch and networking</td>
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<tr>
<td>2.00pm</td>
<td>Main Theatre</td>
<td>Rosie Bailey - Creating opportunities through high impact presentation Skill</td>
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<tr>
<td>3.00pm</td>
<td>Lobby</td>
<td>Refreshments and networking</td>
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<tr>
<td>3.20pm</td>
<td>Breakout 2</td>
<td>Choose from:</td>
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<tr>
<td></td>
<td>Main Theatre</td>
<td>Prof. Robert Kirk - FRS 102 - Time to implement the new standard</td>
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<tr>
<td></td>
<td>Zenith Tax room</td>
<td>Rudi Jansen - How to Generate 90% Conversions on cold, qualified leads in less than 30 days</td>
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<td></td>
<td>Walkin CRM room</td>
<td>Sponsor session</td>
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<td></td>
<td>Payment Sense room</td>
<td>Information room</td>
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<tr>
<td>4.45pm</td>
<td>Main Theatre</td>
<td>Ben Heald - Your personal online brand is key</td>
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<tr>
<td>5.30pm</td>
<td>Close of day one</td>
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<tr>
<td>6.00pm</td>
<td>Ball room lobby</td>
<td>Gala dinner drinks reception</td>
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<tr>
<td>6.30pm</td>
<td>Ballroom</td>
<td>Gala dinner – Ceilidh and disco until late</td>
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### Day 2 – Saturday 21 June 2014

<table>
<thead>
<tr>
<th>Time</th>
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<tr>
<td>8.30am</td>
<td>Lobby</td>
<td>Registration and coffee</td>
</tr>
<tr>
<td>9.15am</td>
<td>Main Theatre</td>
<td>Welcome to the conference</td>
</tr>
<tr>
<td>9.30am</td>
<td>Main Theatre</td>
<td>Phillip Hesketh - Why people don't do what you want them to, why they don't buy and what to do about it all (part 1)</td>
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<tr>
<td>10.35am</td>
<td>Breakout 3</td>
<td>Choose from:</td>
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<td></td>
<td>Main Theatre</td>
<td>Alan McCann - Tax update</td>
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<tr>
<td></td>
<td>Zenith Tax room</td>
<td>Fiona Bevan – How to build a successful management accounting business</td>
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<td></td>
<td>Walkin CRM room</td>
<td>Sponsor session</td>
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<td>Payment Sense room</td>
<td>Information room</td>
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<tr>
<td>11.35am</td>
<td>Lobby</td>
<td>Refreshments and networking</td>
</tr>
<tr>
<td>11.55am</td>
<td>Main Theatre</td>
<td>Peter Sylvester - Harnessing the power of emotion marketing</td>
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<tr>
<td>12.55pm</td>
<td>Breakout 4</td>
<td>Choose from:</td>
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<tr>
<td></td>
<td>Main Theatre</td>
<td>Susan Hallam - How to promote your business on the Internet: 60 tips in 60 minutes</td>
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<tr>
<td></td>
<td>Zenith Tax room</td>
<td>Philip Hesketh - Why people don't do what they don't buy and what to do about it all (part 2)</td>
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<td></td>
<td>Walkin CRM room</td>
<td>Payment Sense sponsor talk</td>
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<td></td>
<td>Payment Sense room</td>
<td>Information room</td>
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<tr>
<td>2.45pm</td>
<td>Main Theatre</td>
<td>Mark Ormrod - You can’t spell disability without ABILITY</td>
</tr>
<tr>
<td>3.45pm</td>
<td>Main Theatre</td>
<td>News round up and close of conference</td>
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<tr>
<td>4.00pm</td>
<td>Main Theatre</td>
<td>AGM</td>
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<tr>
<td>5.00pm</td>
<td>Close of day two</td>
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CIMA 2014 Members in Practice Annual Conference

Speakers bios

Each of the speakers at this year’s conference have been carefully selected because we know they are great speakers whose experience and expertise fit perfectly with our theme of ‘Opportunity Knocks – How to build successful businesses’.

Rosie Bailey
Creating Opportunities through high impact presentation skills
(Main Theatre 2.00pm day 1)

Rosemary originally trained as an actress. After embarking on a theatrical career she moved into the commercial world where she worked as a highly successful sales professional within a major global corporation.

This led to a career in learning and development, helping people to improve their ability to communicate, predominantly through presentations. Her passion and strategies to develop skills to enable presenters to connect with their audiences and to ‘get through’ rather than simply ‘giving out’ has resulted in her becoming a highly regarded trainer and coach. She is co-founder of OnTrack International a consultancy committed to developing people to Think, Believe & Achieve success.

Rosemary is also a highly successful international speaker and regularly speaks to a wide variety of audiences throughout the world. Her lively and dynamic presentation style is moving and motivational.

“This is an interesting and engaging speaker, as you would expect, and shows by example how to present with power and panache.”

Fiona Bevan
How to build a successful management accounting business
(Hanborough Room 10.35am day 2)

Fiona is a MiP and a business owner just like you.

She has built her business by providing management accountancy services to small and medium sized businesses in deepest Somerset. In total she has worked in practice for over 12 years.

As the current conference chair, and practicing certificate assessor, Fiona is passionate about helping MiPs to succeed, in the fastest and easiest way possible, through personal experience.

“This Fiona has a knack of not just explaining important business theory in an easy to understand format but also getting you to put it into practice!”

Susan Hallam
How to promote your business on the internet: 60 tips in 60 minutes
(Main Theatre 1.45pm day 2)

Susan Hallam is one of the UK’s leading digital marketing experts, working both as a speaker and practicing consultant. She is the founder and Managing Director of Hallam Internet, a digital marketing agency working with a number of world leading companies as well as a wide range of smaller businesses.

Previously a Senior Lecturer in Computing at Nottingham Trent University she has also held senior marketing roles at BT and Capital One. Winner of a 2012 Vistage UK Speaker Award, she is a Freeman of the Worshipful Company of Information Technologists.

A chartered member of the IDM, CIM, and CILIP, Susan was born in the USA and a resident of the UK since 1985.

“Susan is the most effective presenter, always energizing and delivering expert content at the right pitch and pace for her audience”

Ben Heald
Your personal online brand is key
(Main Theatre 4.25pm day 1)

Ben Heald is the CEO of digital media experts Sift. Sift has 125 staff, based in Bristol and London, with revenues of over £8m. Sift Media is a B2B online publisher with a portfolio of titles & events (including AccountingWEB, HR Zone & UK Business Forums).

Sift’s PracticeWEB division provides a web platform to 1,000 accounting practices and 500 IFA firms while Sift’s digital marketing agency, Sift Digital provides digital engagement solutions to charities, not-for-profit and member bodies. Before founding Sift in 1996, Ben studied psychology at Bristol University, then trained as an accountant with KPMG, followed by 3 years running his own accounting and consulting practice.

“(Ben) is wise, interesting, analytical with high integrity and a sense of humour...A big picture thinker and thought leader in digital media.”

“The conference is the best way to meet other like-minded, independent, free thinking accountants.”
Philip Hesketh
Why people don’t do want you to want them to, why they don’t buy and what to do about it all
(9.30am Main Theatre and 1.45pm Hanborough Room day 2)

One of the country’s top professional speakers; his specialty is ‘The Psychology of Persuasion and Influence’.

Philip Hesketh is a professional speaker on ‘The Psychology of Persuasion and Influence’. He combines a powerful mix of well researched, persuasive techniques with a unique brand of humor. He inspires, entertains and informs on how buying, selling, persuading and influencing work. He is inspirational, motivational, thought provoking and gives ‘can-use-today’ techniques to be more influential.

He set up his own advertising agency and sold it after 16 consecutive years of growth with the agency billing £48m and employing 150 people.

“You improve your relationships and increase your sales when you listen to Philip Hesketh. Everytime.”

Rudi Jansen
How to generate 90% conversions on cold, qualified leads in less than 30 days
(3.20pm Hanborough Room day 1)

Rudi Jansen qualified as an accountant working in practice before he developed a model to help his clients grow their businesses. Even though his model was very successful, he was highly frustrated at his own conversion rates.

After studying from some of the best people on the planet, he developed a process that gave him 90% conversions on his own cold leads – which he standardised as a system in his business and trained other coaches to use as well.

Now specialising in working with accountants to help them grow their profitable practices, and having worked with a range of accountants from 1-man bands to some of the top firms in the country, he brings a wealth of practical knowledge which is simple and easy to implement.

“Ever since I attended one of Rudi’s marketing programmes our marketing has even transformed. He has a deep understanding of what really brings in good quality clients and how to convert them easily.”

Professor Robert Kirk
FRS 102 Time to implement the new standard
(3.20pm Main Theatre day 1)

Robert specializes in the teaching of and research into the development of accounting standards in the United Kingdom. He has published 15 books and numerous articles in both academic and professional journals. Three of his publications are currently core textbooks for two of the main professional accounting bodies in the United Kingdom.


Alan McCann
Tax update
(10.35pm Main Theatre day 2)

With over 35 years’ experience in taxation, Alan brings a wealth of experience to his dealings with clients and HMRC alike. Alan specialises in tax investigations ranging from relatively straightforward local enquiries to serious fraud issues. His hands on style is greatly appreciated by clients and he has a solid reputation working with HMRC on reaching settlements.

Alan also works in partnership with accountancy firms which do not have in-house taxation expertise, assisting to ensure that their clients receive the best possible advice. He also lectures extensively to the accountancy profession on taxation issues and is a member of the Chartered Institute of Taxation.
Steve McDermott

**We defy you not to be motivated**
(Conference opener 9.50am Main Theatre day 1)

Steve McDermott has won the prestigious European Motivational Speaker of the Year Award no less than three times. That’s because his unique style, half business guru; half stand-up comedian makes people laugh as well as think.

Steve is a founding member and Fellow of The Professional Speakers Association and his book “How to be a complete and utter failure in life, work and everything” is an international best seller.

From Blackpool to Berlin, Manchester to Moscow, Steve hasn’t just talked to thousands of people but also encouraged them to take positive action. This down to earth Yorkshire man is an inspiration to his audiences. His simple, straight forward ideas work. From his own personal experience, and the research he has conducted over the past 20 years, Steve has come up with the very best methods for improving the way you think in order to improve your chances of success in life and business. He has honed his skills by working with, and speaking to, some of the world’s top organisations, entrepreneurs and peak performers.

Not only is Steve a bestselling author, broadcaster and businessman but he is also a consultant, coach and trainer for a host of organisations including Pets at Home, ITV, Coca-Cola and Harrods.

“I was looking for a motivational, inspirational way to send everyone out of the door feeling full of confidence and positivity, with their side aching a little from laughter during the process! Steve McDermott delivered in spades”

Richard Mullender

**Communication secrets of a hostage negotiator**
(11.10am Main Theatre day 1)

Richard Mullender is a former hostage negotiator, and former lead trainer at the National Crisis & Hostage Negotiation Unit at Scotland Yard.

Whether it’s negotiating with terrorists, talking a would-be suicide down from a rooftop or convincing a child to eat their greens, Richard's listening skills expertise is cutting-edge. Now a full-time speaker and trainer, Richard brings the skills of the hostage negotiator into the business world, helping professionals to build rapport, gain trust and exert influence.

At Scotland Yard, Richard was responsible for the design and delivery of the Yard’s flagship ‘National Negotiators Course’. He has worked with the U.N., FBI, South Africa’s “Scorpions” Unit, the Indian Secret Service and the British police. Clients include Oracle, IMI, BAE, SAS Software and Cambridge University.

“Richard Mullender was awesome. Need him back again”. (Comment from the MiP 2013 conference - see, we do take note of your feedback!)

Mark Ormrod

**You can’t spell disability without ABILITY**
(Conference closer 2.45pm Main Theatre day 2)

Mark applied to join the Royal Marines at 16, undergoing his basic training at 17. By the age of 18 he was a fully trained Royal Marines Commando. At 19 he was involved in the war in Iraq and after serving his minimum time of 5 years he left the military to pursue a career as a bodyguard. Things as a civilian didn’t go the way Mark had hoped and within 12 months of leaving the military he had signed back up with the intention of picking up where he left off. He hoped to deploy to Afghanistan and got his wish in on Christmas Eve in 2007.

During his time in Afghanistan, whilst on a routine foot patrol he stood on and detonated an Improvised Explosive Device, the damage to his limbs was so severe that surgeons decided to amputate both of his legs above the knee and his right arm above the elbow making him the UK’s first triple amputee from the conflict.

Since being injured Mark’s life has taken a different turn, and he has begun a new journey that brings him to Heythrop Park to share his story with you.

“Mark spoke at our customer conference in October 2013, he was absolutely brilliant, very engaging and very likeable. Mark tells his story in such an uplifting and positive way you can’t help but smile”

Peter Sylvester

**Harnessing the power of emotion marketing**
(11.55pm Main Theatre day 2)

Peter Sylvester runs four successful networking organizations in the Midlands, serving 400 members. He uses his Senior Vice-President experience with Harley-Davidson International to coach business owners nationwide.

Peter is also an award-winning international speaker and he is often referred to as an “Inspirationalist”.

“Peter is a highly skilled and passionate business owner, speaker and professional mentor.”
CIMA 2014 Members in Practice Annual Conference

What conference means to me

Kat Hipsey
MiP based in Kingston upon Thames, Surrey

I'm now in my 3rd year of being a MiP. I came to the conference my first time 2 years before I made the leap and have been coming back every year since I became independent.

The conference is the best way to meet other like-minded, independent, free thinking accountants. I'm still in touch with several of the MiPs I met at my first conference. They have acted as mentors and friends to me throughout the process.

Being a MiP can sometimes be a lonely existence but for 2 days each year, you reaffirm that you’re far from it. I now offer advice to other new MiPs starting their journey and am happy to help where I can. The thing I found most amazing about this group of people is their willingness to share and collaborate. Everyone is very open and happy to share ideas and help out wherever they can. The conference is instrumental in initiating a lot of these relationships. The content of course is valuable too but for me the conference is all about the attendees and the momentum that follows.

Russell Heath
MiP based in Cowbridge, South Glamorgan

I have been a CIMA MiP since 1994, my practice is 20 years old this September and I have attended the MiP Annual Conference every year since 1995!

I attend every year as it is such a valuable resource of learning. Meeting fellow MiPs who share similar experiences, and attending lectures on all aspects of tax, software and marketing techniques, which are always informative. The Conference always exudes an atmosphere that we are there to help and learn from each other, within a relaxed and informal environment. There is an emphasis on growing your practice and that any issues with being an MiP (new or established) can be addressed. The venue of Heythorp Park, is in my opinion, a perfect setting. Every MiP who is committed to being successful should attend the Conference.

Ian Ross
Wilmslow, Cheshire

I’ve been to the MiP Conference for about 7 years. It’s a great way to meet like-minded people, share problems, find solutions and pick up lots of new ideas. I always come away reinvigorated with enthusiasm and ready for the fray. I also realise that MiPs are so generous with their support for other MiPs, particularly people who are just starting out on their MiP journey. It can be quite daunting going solo after years in a corporate environment, and everyone needs a bit of help. After all, you don’t know what you don’t know. Building a network of other MiPs to help you avoid some of the minefields that litter self-employment is a real benefit. I hope to see you at the conference in 2014.

Lyn Watson
MiP based in Nottingham, Notts

If you haven’t been to the conference before, then come along, you won’t regret it! When I started my practice 7 years ago it gave me the boost I needed to know what is possible and believe in myself, I can honestly say I have never had so much of a return on investment on anything else that I have ever bought for my business.

The conference now represents a chance to recharge my batteries, let my hair down and catch up with old friends as well as keeping up with all the need to know CPD stuff as well. Not to mention an excuse to buy a new dress for the gala dinner. I look forward to meeting those of you I haven’t already met in June.

InTouch, In Tune | Summer 2014
CIMA 2014 Members in Practice Annual Conference

Sponsor biography

Main Sponsors

Many firms are doubtful, cynical or unsure about App technology, which is understandable, since nobody had one a few months ago. Visit the MyFirmsApp stand at the CIMA MiP conference to find out why hundreds of your fellow accountancy professionals have launched Apps with great results. They will give you a live App demonstration, where you can view the very latest new features.

Discover how an App will help you save time, engage clients in a brand new way and help you generate quality new enquiries. Combine, these benefits will give you a rapid ROI and differentiate your firm. Visit www.myfirmsapp.co.uk to find out more.

Xero is the global leader in cloud accounting with over 250,000 people worldwide using them to get instant, mobile access to their accounts in the cloud.

Xero help accountancy practices really add value for their clients. It’s what then do, you collaborate with your clients online through the single ledger, creating a new type of working relationship that goes beyond just meeting their basic compliance requirements. With Xero you can evolve into a truly modern practice – one where experience and expertise turn you into a trusted business adviser. Visit www.xero.com/uk/partners/

Stand Sponsors

The Association of Taxation Technicians primary objective is to promote education and the study of tax administration and practice; they have a growing number of CIMA Members in Practice who are taking their papers.

As a CIMA Member in Practice you will need some tax knowledge, even if you are not specifically offering tax advice as a service. Within practice work, tax does not sit in isolation and in fact it is embedded within a wide range of services that you offer to clients which means issues could arise.

To improve your competence in tax before you undertake the work, why not consider the modular qualification offered by the Association of Taxation Technicians (ATT)? The modular structure offers free standing certificates of competency and you may take as many or as few of the papers you need. For each paper that you successfully pass, you will be awarded a Certificate of Competency in that subject by us. For more details, please go here: www.att.org.uk/CIMA

Catax Solutions is the largest capital allowances specialist in the UK providing capital allowances valuation reports to anyone incurring capital expenditure buying, building, or making adjustments to commercial property. To date, Catax Solutions has identified more than half a billion pounds of unused capital allowances for over 4,000 clients. The average claim is around £125,000, with the biggest in the tens of millions.

Professional partnerships are very important at Catax Solutions, and in addition to being the Law Society’s endorsed partner, Catax Solutions has worked alongside over 70% of the largest professional practices in the UK. Many accountants choose to work with Catax Solutions due to the complex nature of identifying capital allowances. Contact Catax Solutions today on 0300 303 1903 to find out more.

ECS are proud to enhance it’s longstanding support of the CIMA MiP community as an official partner. ECS have been working for, and with, MiP’s since 1995 and are excited to be involved in this new project.

As one of less than 100 Chartered Insurance Brokers in the UK you can be sure of the quality of professional partner you are working with. Visit them at the conference and find out about their PI scheme for MiP members and if they can enhance your revenue stream. Visit www.ecsbrokers.com to find out more.

Freedom Search brings a wealth of experience in online marketing, specialising in the promotion of Google Adwords. Their prime focus is to make sure ‘YOU’ the customer, understand what you are buying and how being featured within Google, can push your business to the forefront of where your future customers will be looking.

CIMA members are already engaging with us including our very own MiP Panel Chairman, Stephen Milne.

Freedom Search are eager to speak with you and discuss any requirements or worries you may have with advertising on Google and will work with you to put together a package that will fulfill all your requirements and generate traffic to your business. Visit www.freedomsearch.co.uk to find out more.

jumpstart

Since the introduction of the R&D tax scheme in 2000, the majority of British companies could be eligible for the schemes are not claiming. It is widely accepted that more than £10 billion has been left unclaimed in the UK since the start of the scheme. This is money that could have been reinvested into further improvement and development of products and manufacturing processes.

Their technical analysts at Jumpstart have a deep knowledge and understanding of HMRC’s R&D policy and regulations. Their scientific backgrounds allow them to speak the language of their clients and to identify eligible activity and processes often hidden in the daily routines of your production and process work.

Jumpstart works in many industry sectors and with companies of all sizes, from small SMEs to larger companies in the £100 – £300 million bracket, some of which are part of larger £1 billion groups. Visit www.jumpstartuk.co.uk to find out more.

OCRex has developed AutoRec which automates the process of performing bank reconciliations and analysis from bank, online and card statements. Stop typing up transactions from statements! Autorec does this for you automatically. Nearly 1,000 practices have subscribed to AutoRec in just two years.

AutoRec is the perfect tool for preparing incomplete records clients or revenue audits. AutoRec will do in 20 minutes what normally takes 4 – 8 hours manually. You can complete a full payment and receipt analysis then export reconciled data to CCH, Vittozta, VT, IRIS, Xero, Digita, Sage and many more software packages. Call 0203 393 3058 or visit www.ocr.ex.com to find out more.

InTouch, In Tune | Summer 2014
Networking Skills train successful business owners to stop selling, and start partnering. They combine the power of face-to-face coaching with online training to teach business professionals throughout the world how to harness the power of word-of-mouth marketing to drive activities for a fast, sustainable business growth. Are you getting all the referrals you want for your business? Only 3% of companies have a firm plan to maximise that growth. By simply following the Networking Skills techniques, you will be learning how to double your turnover.

Networking Skills run local two hour sessions combined with online coaching showing you how to motivate people to refer business to you. They introduce a refined “partnership” approach to both clients and referral partners and you will learn some specific techniques that will enable you to really work smarter, not harder. Call Peter Sylvester on 0121 711 5112, or email him at peter@business-unlimited.co.uk for more information.

PFP is delighted to be CIMA’s preferred partner on Tax Investigation Insurance. PFP are a market leader in Fee Protection and have nearly thirty years experience of helping CIMA member firms launch and run successful Fee Protection schemes.

PFP offer a highly experienced team who will be on hand with advice on tax investigations and effectively marketing your scheme to your clients. A major benefit of working with PFP is that you can subscribe free of charge to their monthly CPD webinars which will help to ensure you get the very best and most up to date advice on Tax Investigations. As a CIMA member you can also benefit from free marketing support from PFP for your Tax Investigation Insurance scheme. This even includes PFP sending mailings for you free of charge and designing and printing bespoke leaflets for your practice.

To speak to one of their experienced consultants please call 0845 3071177 or email info@pfpuk.com and quote “CIMA MiP Special Offer” or visit www.pfponline.com/tax-investigation-insurance-cover/ to find out more.

SWAT UK offer one of the most comprehensive ranges of accountancy CPD courses in the UK. They run over 300 courses in 18 venues throughout the country. Courses cover a wide range of current and topical areas and are presented by some of the country’s leading accountancy lecturers.

In addition, their programme of live and recorded webinars gives you access to over 200 courses from the comfort of your own desk, whenever and wherever it suits you.

With a range of flexible and competitive pricing options available, SWAT UK is confident they can meet all of your training requirements. Visit www.swat.co.uk/default.aspx to find out more.

Networked businesses benefit from being able to harness the power of other businesses and create a “network effect” which helps them to grow. Networked businesses are able to develop a type of reputation that is difficult to replicate by competitors. They can also share resources and costs in a more efficient way. Networking skills help you to find and engage with the right people, and benefit from the power of face-to-face coaching.

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Networking Skills train successful business owners to stop selling, and start partnering. They combine the power of face-to-face coaching with online training to teach business professionals throughout the world how to harness the power of word-of-mouth marketing to drive activities for a fast, sustainable business growth. Are you getting all the referrals you want for your business? Only 3% of companies have a firm plan to maximise that growth. By simply following the Networking Skills techniques, you will be learning how to double your turnover.

Networking Skills run local two hour sessions combined with online coaching showing you how to motivate people to refer business to you. They introduce a refined “partnership” approach to both clients and referral partners and you will learn some specific techniques that will enable you to really work smarter, not harder. Call Peter Sylvester on 0121 711 5112, or email him at peter@business-unlimited.co.uk for more information.

Where quality software need never be expensive, BTCSoftware are independent specialists in tax and practice management solutions for the SME practitioner market and include a growing number of CIMA MiP members amongst their users. They won both the best Tax & Practice Management categories in Accounting Web’s Software Satisfaction Awards 2013 and attribute their continued growth to the following:

- Extremely competitive & “ladder-free” pricing
- Robust, intuitive and accessible software
- Helpful, responsive and unlimited support
- Low cost monthly subscriptions

For more information speak to Andrew Ross on 0800 612 7650 AndrewRoss@BTCSoftware.co.uk

Developing your business is important to Walkin CRM; at the conference they will show you the following features and benefits:

- simple and easy to use
- how to develop existing customers
- integrated website options
- simple reporting
- instant sign
- advanced visual dashboard
- unlimited users
- revenue development
- automatic email updates
- training and support
- inbound lead management
- multiple partners

Zenith Tax Solutions are an independent team of Chartered Tax Advisers specialising in tax consultancy services. They are members of the Chartered Institute of Taxation with over 100 years of wide ranging tax experience, and cover the majority of the UK. Zenith provide bespoke tax advisory services to accountancy practices who wish to offer their clients the tax advice they need without the expense of creating an in house tax department helping with corporate tax, personal tax, inheritance tax, indirect tax. For information please visit www.zenithtax.co.uk

PaymentSense was founded by two serial entrepreneurs with a track record of building high growth, and disruptive businesses. The strength of the founders lie in ones success at building businesses in the payments industry and other in signing up over 300,000 SMEs in the UK. PaymentSense specialises in providing small and medium businesses with fast, reliable and affordable card processing services. Its core audience of UK SMEs can be categorised within one of the following three industry segments; restaurants & hospitality, retail and service. The market has been dominated by an oligopoly of complacent banks that passively acquire customers through their bank branch network. They expend a disproportionate amount of energy on servicing large corporate clients, leaving SMEs under-served and overcharged. PaymentSense has set out to disrupt the banks’ traditional grip on the market. Its three unique selling Points resonate with SMEs whilst capitalising on the banks’ weaknesses:

- capped rates for the duration of the contract
- the fastest set up times in the UK
- 24/7 UK based support

visit www.paymentsenseco.uk
InTouch, In Tune

Professional, relevant and ethical: upholding your values as part of your professional development

If you have some CPD to catch up on but not sure what to do, why not be inspired by the CIMA Ethics Support Guide?

This Guide outlines all ethics related resources available from CIMA, which can be used as part of your professional development.

The Global Management Accounting Principles, which are currently in consultation, defines the values of a management accountant based on the acronym PRIDE (Professional, Relevant, Innovative, Diligent, Ethical).

Your commitment to ethics and your professional Code being a core part of your commitments to CIMA, it is important that you are up to date with the latest developments in relation to responsible business and relevant legislation, and remain confident to use and uphold the Code of Ethics and its principles – in other words that you ensure that you remain Professional, Relevant, and Ethical.

Take the opportunity to brief yourself on the latest updates around anti-bribery, take a look at our newly revised exercises and ethics training page.

Find these and many more resources which can count towards your CPD in the Ethics Support Guide.

CIMA Press coverage

Sustainability tips for SMEs

CIMA Technical Specialist, Sandra Rapacioli was interviewed in The Guardian discussing sustainability tips for SMEs and was re-reported in Business News Today. Click here to read the report.

Computer based testing

CIMA’s partnership with Pearson VUE and the decision to move to computer based testing in 2015 was reported in Business Recorder.

CIMA raising the bar for the industry

Recently CIMA has launched two outstanding products: Global Management Accounting Principles and The updated Syllabus. In doing so we have established a suite of world leading products that ensure we are relevant today and will remain relevant in the future.

The reaction at the product launch events and in media channels around the world demonstrates that not only do we have a groundbreaking suite of products but our customers – our students, members, tuition providers and business leaders are excited about the benefits our products will bring for them and their organisations.
When was the last time you reviewed the appropriateness of your Professional Indemnity Insurance (PII) cover?

Under CIMA’s regulations, members in practice are required to hold PII as they fall within the definition of accountant under CIMA’s Member in Practice Rules.

As standard, PII must cover you for negligence claims and for the cost of defending a claim brought by a dissatisfied client. You are recommended to consider whether your proposed cover would be sufficient to meet potential claims, based on an assessment of your clients’ circumstances and your own or your practice’s exposure to risk, and also bear in mind that cover may be needed for other practice staff and for all the practice’s activities. Members offering consultancy services, even though not regulated by CIMA, would be well advised to consider cover too and levels of cover will be available based on an assessment of your risk.

Allegations of misconduct are a different matter: there is no regulatory requirement for members in practice to have cover for legal expenses which they may incur in defending allegations of misconduct made by a client. CIMA is aware that there is concern among some members in practice about the costs of defending such an allegation, and has started to research this issue and had some preliminary discussions with relevant parties.

Our findings so far are that insurance companies are aware of the growing demand for such cover and are offering products to support this – though at the moment this would be through an add-on to existing policy cover or specifically tailored PII cover.

We know there is more to be done on this, and will return to the subject later in the year with further guidance. In the meantime, you may wish to reread the advice on the website about insurance and review what your existing PII policy covers you for and whether it is at an appropriate level. Remember also that a good complaints procedure – which is a requirement for all members in practice - can help reduce the risk of claims or stop them escalating by addressing clients’ concerns early and resolving misunderstandings.

Further information:
Professional Indemnity Insurance: http://www.cimaglobal.com/Members/Members-handbook/Licencing-and-monitoring/Members-in-practice/Mandatory-requirements/Professional-indemnity-insurance/

Complaints handling procedures: http://www.cimaglobal.com/Members/Members-handbook/Licencing-and-monitoring/Members-in-practice/Mandatory-requirements/Complaints-handling/
Social marketing for your business

Promoting yourself is key to getting business; in the past, the model for marketing was making cold calls, which lead to qualify leads and sales demonstrations. Now day’s things are very different with the use of Social networks to engage customers and educate them. Steve Bicknell from Bicknell Business Advisers Limited, shares with us his tips on the best time to engage with potential and current clients, using the latest social media platforms.

Share at the right times

Different social networks have different peak times for posting.

Take Advantage!

1pm – 4pm
1pm – 3pm
7am – 9am
5pm – 6pm
9am – 11am
2pm – 4pm
8pm – 1am

CPD monitoring of 2013 activities

The Members in Practice who have been informed of their random selection for CPD monitoring and who are yet to submit their reports for assessment will be e-mailed the first formal request to return these on 14 April, the deadline being noon (GMT) 15 May 2014. An example of a completed form, plus other resources to enable CPD submission, and CIMA’s requirement is available on the CIMA website.

IFAC

The IFAC Global Knowledge Gateway is a new online resource available with a new subject area that has been added - ‘practice management’. The resource is available after the link www.ifac.org/global-knowledge-gateway/practice-management?resources#
One of my favourite movie scenes is Monty Pythons “Life of Brian” where an entire crowd shout “We are all individuals!” It was apparently the most expensive scene to produce: taking many hours to get that one line in absolute unison.

This scene often comes to mind when I hear hundreds of professionals insisting how unique they are. Like the Monty Python scene, it can also be an expensive scene to shoot; particularly when you think of all the money that gets spent on branding, identity, materials, logos... much of which is often jettisoned a couple of years later.

So why is everyone so obsessed with being unique? So what if someone in San Francisco is doing the same as you are? Or even someone in your own town?

As professionals, of course we want to be memorable. When someone out there has a need, we want them to be able to call us to mind (and, for that matter, able to find us online). When they see someone else in need, we hope they will introduce us as someone who can help. In today’s climate, they may also have to encourage the other party to make the investment... which means they really need faith in us.

But does that mean that we have to be unique? Why all this insistence on the "U" in USP?

If we are going to be remembered, we certainly need to be different in some way. We need to stand out: whether for specialist expertise, determination, friendliness, trust-worthiness, consistency, niche knowledge... and increasingly all of the above.

However, does that mean that we have to be unique? Probably not. A professional’s concern with uniqueness can often be merely another manifestation of their Ego. If we are genuinely concerned about how we can be useful in the marketplace, we are perhaps less concerned about whether anyone else is offering the same as we are, and more concerned about how the marketplace is evolving and how we can be of service there.
UK Finance Bill 2014

In the Autumn Statement 2013 on the Finance Bill 2014 the UK Government announced the following measures to combat tax avoidance with effect from 5th December 2013:

- Corporation tax: avoidance involving losses
- Debt cap
- Controlled foreign companies: profit shifting
- Partnerships
- Avoidance schemes using total return swaps
- Double taxation relief: revenue protection
- Code of Practice on taxation for banks

HMRC will also be required to publish an annual report from 2015 on the operation of the Banking Code of Practice, including a list of those banks that had adopted or re-adopted the Code by 4 December 2013. The legislation for all these measures will be included in Finance Bill 2014, and is accompanied by explanatory notes, and Tax Information and Impact Notes (TIINs).

In addition, draft legislation was published for consultation including:

- Promoters of tax avoidance schemes, amendment of return to take account of relevant judicial rulings and DOTAS
- Modernising the taxation of corporate debt and derivative contracts
- Artificial use of dual contracts by non-domiciles
- Corporation tax: avoidance involving losses
- Chargeable gains anti-avoidance rules
- Avoidance schemes using total return swaps

In addition, on 24 January 2014, the government published draft legislation and supporting documents on the proposals in the Raising the Stakes on Tax Avoidance consultation.

The MiP Panel was informed of the measures with immediate effect and also the opportunity to contribute to the consultations which closed on 13th / 14th and 24th February 2014. Developments from the consultation will be monitored by CIMA. Please send any comments on the ongoing developments with the Finance Bill to the professional standards department professional at professional.standardsandconduct@cimaglobal.com

Accountants’ professional conduct in relation to taxation

The Chartered Institute of Taxation has published final guidance on professional conduct standards to be applied by advisers when giving tax advice. This publication is timely in light of recent debate as to the extent to which accountants may legitimately advise clients on tax planning. HMRC has approved this guidance as an acceptable basis for its dealings with tax advisers. CIoT have increasingly seen PI claims against advisers who have had a hand in tax mitigation schemes and this note provides some guidance based on their experience of these complaints. Please click here.
Tax avoidance advice –
The real cautionary tale

On a hypothetical scale, one end of which is "ethical business" and the other "economic crime", the area in the middle remains quite a dark grey. A recent successful appeal by a UK firm of accountants found guilty of negligence does not really bring much clarity in a cautionary tale due to the nature of the conclusion. In June 2013 a UK High Court Ruling found a firm of accountants to be negligent because they failed to recognise the non-domiciliary status of a client and subsequently failed to notify him of an off-shore tax avoidance scheme. The ruling stated that advisers must refer clients to tax avoidance schemes which left practitioners concerned that their ethical principles would be compromised.

This outcome was felt to herald a fundamental shift in how tax practitioners advise their clients, clashing uncomfortably with the ethical codes of professional accountancy institutes (not least the ICAEW, which had made avoidance a disciplinary issue in 2012). The ruling was overturned on appeal on the grounds that the firm did not offer specialist tax services and could therefore not be expected to be competent to advise. In the Appeal Ruling, Lord Justice Lewison stated that "The extent of (his) duties depends upon the terms and limits of that retainer and any duty of care to be implied must be related to what he is instructed to do". This rather sidesteps the ethical issue of whether professional accountants should be drawing clients’ attention to high-end, complex and risky (some may say aggressive) tax avoidance schemes. It does, however, highlight the importance of the functional specialisms and how they are communicated to clients. The delineation between basic and specific schemes should be made clear, if not in the letter of engagement, certainly in the ongoing relationship with clients. Accountants should be clear where their competence begins and ends and ensure that they seek suitable specialist advice when asked to advise on complex tax matters outside their normal scope of duty. So whilst the debates around tax evasion vs tax avoidance continue, and anti-avoidance measures are introduced via the UK Finance Bill 2013, right now, communication is really the key lesson to be learned from Mehjoo vs Harban Barker. How does an adviser ensure that a client understands exactly what is offered? Clarity from the start of the client-adviser relationship is the key whether on a retainer or not.

IFAC Global Knowledge Gateway

The International Federation of Accountants (IFAC), the global organization for the accountancy profession, launched of the Global Knowledge Gateway, in March 2013, a platform designed to bring together news, views, resources, and thought leadership for the worldwide accountancy profession. The Gateway showcases key accountancy materials and provides a forum to explore thought-provoking issues, participate in discussions, and be part of the global community of accountants that IFAC represents. CIMA is already utilising the Gateway to seek comments from the international community of accountants on the Global Management Accounting Principles.

With content ranging from developing areas of the profession to longstanding but continually evolving areas of accountancy, the Gateway initially focuses on the following topics: Ethics, Business Reporting, Finance Leadership & Development, Performance & Financial Management, Governance, Risk Management & Internal Control, and Sustainability. The breadth of topics is meant to serve the diverse sectors of accountancy, including IFAC member organizations, accountancy professionals, the regulatory community, and firms, as well as accounting students. To gain full access to the Gateway’s offerings register on IFAC’s website.
Insolvency Practitioners in the UK

Insolvency Practitioners (IPs) hold a position of trust as regards creditors, debtors and the employees of the insolvent. In carrying out their duties, IPs must comply with statutory requirements, including under insolvency and related legislation. They must also comply with professional standards, which include non-statutory statements of insolvency practice (SIPs), rules set by the RPBs, a joint code of ethics and guidance notes. Underpinning the regulation of IPs in Great Britain is a dual regulatory approach of self-regulation by the profession and independent oversight regulation by the Government. The Secretary of State is the oversight regulator for IPs UK which in practice is delegated to the Insolvency Service, delegated in turn to Recognised Professional Bodies (RPBs) including the accountancy bodies ACCA, ICAEW, ICAS and CARB.

The UK Office of Fair Trading has suggested that the current regulatory system lacks objectives against which IPs can be held to account resulting in an inconsistent approach taken by the different RPBs, making the role of the oversight regulator more difficult. Following on from a Consultation on reforms to the regulation of insolvency practitioners in 2011 the OFT has suggested strengthening the statutory regulatory framework by introducing regulatory objectives for the RPBs and giving the Secretary of State a range of proportionate powers to deal with RPB failure to comply. The consultation closed on 28 March 2014 and CIMA will monitor any regulatory developments. In February 2014 the EU backed proposals to change cross-border insolvency rules, to include the introduction of a web-based insolvency register for all insolvent businesses and negating the need to open several insolvency cases in each country for the same business. The Council is still in the process of discussing the draft law. It is expected that ministers will be able to reach a general agreement at their meeting in June 2014.

EU accounting directive and audit thresholds

There are potential opportunities for CIMA Members acting as reporting accountants if audit thresholds are raised by BIS. As part of changes to the EU’s Accounting Directive, voted through European Parliament earlier this year, member states can significantly increase the size of businesses that do not require audited financial statements. Last year, BIS aligned mandatory audit thresholds with a range of businesses that can be defined as small, and thus exempt from an audit, under EU rules. EU member states have until 2015 to implement the directive, and BIS is expected to consult on any changes next year.

HRMC

Anti-money laundering update from HM Treasury (UK)

Recent developments in Ukraine have highlighted the need for firms to remain vigilant to the risk of corrupt asset flight. The FCA reminded financial institutions of their obligations under the Money Laundering Regulations and the Proceeds of Crime Act in light of developments in Ukraine. For more information, click here.

Corrupt asset flight may be facilitated through companies and other legal arrangements, or other transactions designed to quickly liquidate assets held in the UK. Robust beneficial ownership checks by firms are therefore vital. Please ensure you have the appropriate systems and controls for due diligence, ongoing monitoring and reporting of suspicious transactions, including PEP and beneficial ownership checks in place.

Anti-money laundering – consent to proceed

If a particular transaction or activity raises suspicions of money laundering, members in the UK can contact the National Crime Agency (NCA) for consent to proceed. The NCA have also produced a helpful document ‘Review of Accountancy Sector Consent Requests’ with case study examples and is available to download here.

HMRC issue briefing: how we tackle offshore evasion

HMRC have published a briefing on how they are tackling offshore tax evasion. The briefing explains how they are reducing the opportunities for offshore evasion, what they are doing to identify and catch evaders, and the tough consequences for those who evade their taxes. The briefing can be found here: www.gov.uk/government/publications/issue-briefing-how-we-tackle-offshore-evasion
UK Growth Voucher Programme

The Enterprise Nation Marketplace is part of the government’s £30m Growth Vouchers programme. A trial to find out how strategic advice impacts on businesses performance, and a research project to test how best to help small businesses grow through the use of subsidised business advice.

The programme will distribute vouchers to around 20,000 small businesses in England, focussing on small businesses who have never sought business advice before. Businesses looking for advice can apply to the programme online and they will be randomly assigned to an online questionnaire or face-to-face business advice assessment. Some businesses will be randomly chosen to get a voucher for up to £2,000 to help pay for business support in one of the specialist areas. You'll have to match the amount with your own funds. You can then find a Growth Voucher adviser to work with on the Enterprise Nation Marketplace; pay for the services in full and request 50% back from the government.

If you’d like to take part in the programme and work with businesses looking for subsidised advice, you can register as an adviser on the Enterprise Nation Marketplace. To qualify you must be a member of a professional body that:

- has a code of conduct, which includes a complaints handling process and the ability to remove a member if found to be breaking code
- is recognised as the lead authority or one of the lead authorities on one or more of the five advice topics of the Growth Vouchers programme
- has robust membership standards (i.e. members must prove relevant qualifications, experience, continuing professional development, references, etc.)

CIMA membership may not in itself qualify you to become an adviser automatically – you must go through the application process, but CIMA (CIMA Member in Practice) is mentioned in the list of examples of professional body memberships.

Employment Disputes – are you ready for the change?

For employers, facing an employment tribunal is a prospect that many dread. This is understandable, considering the average cost is £6,200 and employers spend around five days defending a case. Added to the distress and emotional turmoil that these cases can have on all participants, and the fact that parties can wait at least 13 weeks for a hearing – it is easy to see why.

From April 2014 Acas is launching a new free statutory service called Early Conciliation (EC). Anybody wishing to bring a tribunal claim will need to first notify Acas, and they will attempt to resolve the dispute, avoiding the stress, cost and anxiety of an employment tribunal before the claim is lodged. Click here for more information about EC.

Early Conciliation builds on the success of a similar service called Pre Claim Conciliation (PCC). In 2012 PCC helped resolve three-quarters of the cases they were involved in without recourse to a tribunal – in other words, over 21,000 disputes between employers and employees reached a mutually acceptable conclusion.

Compared to the cost and time spent on an employment tribunal, the average cost of resolving a case through PCC is just £475 for employers, and takes around one day. Recent independent research has found that nearly nine out of ten employers who used PCC said that they would use it again if they were involved in a similar dispute.

Conciliation is free, easy and voluntary – if either an employer or an individual wants to avoid a service that is easier, faster, cheaper and less stressful than being involved in a tribunal claim, they can.

Workplace experts, Acas, offer an independent and impartial service, which includes free employment advice and guidance to employers and employees on workplace problems. If you are looking for unbiased professional guidance on workplace relations, have a problem at work, or wish to ask a question about an issue you are facing – their free online or telephone services can help: 0845 4747477 | www.acas.org.uk

£2000
For small businesses to gain strategic advice

GROWTH VOUCHER

Get in touch
We want to hear from you. Email us at: georgia.stephanou@cimaglobal.com
Your Management Accountant

This is a not-for-profit website where practising MiPs can advertise. The idea of Your Management Accountant is to put SME owner/managers in touch with MiPs who can help them with their business problems in an easy and straightforward way. This is an excellent opportunity for CIMA MiPs to work together to raise the profile of management accounting. Once you have paid the £50 joining fee you have access to load your profile.

Business information service for MiPs

CIMA, in partnership with Law Express, provides a free business information service for UK and Republic of Ireland members. It covers many typical business and legal issues affecting members both running businesses and employed in business. There is also a limited free telephone helpline service on referral from the CIMA Professional Standards Department for members unable to find solutions from the web information. Should you want to find out more please go to the Members in Practice section of the CIMA website.

Dates for your diary

**7 MAY**
Scottish Members in Practice meeting
Venue: Royal Hotel, Sterling FK9 4HG
Time: 6.00pm | Cost: No cost to attend

**7 MAY**
Pitching for business workshop
Venue: Kendal College, Cumbria, LA9 5AY
Time: 9.30am | Cost: No cost to attend

**10 May**
West Midlands MiP meeting
Venue: Becketts Farm, Birmingham, B47 6AJ
Time: 9.30am | Cost: No cost to attend

**19 May**
Charity accounting workshop 1 – Introduction to charity accounting: governance and trustees
Venue: Future Inn, Bristol BS1 3EN
Time: 9.00am | Cost: £25

**15 April**
Self employment – the CIMA route
Venue: Novotel Nottingham, Nottingham NG10 4EP
Time: 6.30pm | Cost: No cost to attend

**16 June**
Turbo-charge the finance function
Venue: Bristol Golf Centre, Bristol BS10 7T
Time: 9.30am | Cost: £40 to attend

**20-21 June**
2014 annual Members in Practice Conference - Opportunity knocks – how to build successful business
Venue: Heythrop Park Crowne Plaza, OX7 5U
Time: 9.00am | Cost: please visit website