

building
better
together.

CPD
AVAILABLE



2015

Events & products



building
better
together.

UK200Group offers a high level of training and practice support to its members, which cannot be accessed anywhere else

Terms and Conditions

No refund is possible on cancellations if notified after date stipulated on registration form.

An administration charge will be made for cancellations before that time.

All cancellations/alterations **MUST** be made in writing to the Centre.

No travel arrangements are to be made unless email confirmation of event has been received from the Centre.

UK200Group reserves the right to alter the date/programme/speakers/price without prior notice.

UK200Group 3 Wesley Hall, Queens Road, Aldershot, Hampshire GU11 3NP

Tel +44 (0)1252 401050 or +44 (0)1252 350733 admin@uk200group.co.uk www.uk200group.co.uk

UK200Group is an association of separate and independently owned and managed chartered accountancy firms and lawyer firms. UK200Group does not provide client services and it does not accept responsibility or liability for the acts or omissions of its members. Likewise, the members of UK200Group are separate and independent legal entities, and as such each has no responsibility or liability for the acts or omissions of other members.

Issued Apr 2015

Contents



Training

2 – 3

Agriculture	Business Strategy
Charities & Education	Corporate Finance
Freelancers & Contractors	Forensic Accounting & Dispute Resolution
Healthcare	International
Legal	Tax
Property & Construction	



Conference and Forums

4 – 5

Annual Conference	Managing Partners Forum
Business Recovery & Insolvency Forum	Practice Forum
COLP & COFA Forum	Informal Dinners
Freelancers & Contractors Forum	Marketing Forum
IT Forum	Quality Workshop
Lawyers Group Meeting	IAPA Conference & Events
Managers Forum	



Marketing Support

6

Industry Group client newsletters	PR
e-newsletters	Press Panel
UK200Group e-news	Blog
Leaflets	



Technical Support

7

taxtalk e-bulletin
Infocus technical advisers booklet
Infocus lawyers booklet
Charities & Education Group Handbook



Practice Tools

8

Risk Management 'Calculator'	Business Opportunities Register (BOR)
SME Valuation Index	External Review Manual
Powerpoint presentations	Benchmarking
Profitwatch	Lifestyle
e-member enquiry system	
PowerPoint presentations	



Agriculture

Objectives:

The UK200Agriculture Group have the reputation of delivering excellent training courses for specialist agriculture advisers. Members have the opportunity to hear professionals with a strong knowledge and experience of the agricultural industry speak on key issues affecting business, including tax, finance, European issues and the rural economy.

Location: London

Date: 25 Jun 2015

Charities & Education (including Academies)

Objectives:

Utilising expert speakers the training day provides an update on current issues facing the charities sector, which range from technical accounting, taxation and legal matters to broader regulatory and economic matters.

Location: London

Academies

Date: 1 Jul 2015

Charities & Education

Date: 11 Jun 2015

Freelancers & Contactors

Objectives:

Originally launched as a forum in 2014 the Freelancers & Contractors has now achieved industry group status from April 2015. This will be the group's inaugural training course.

Location: London

Date: 8 Jul 2015

Healthcare

Objectives:

Our Healthcare course is specifically designed to provide members with important information and updates to support their clients in the primary care sector, whilst continuing to provide the right advice to run successful and profitable businesses.

The training courses have a strong focus on the GP and dentists sectors, where there is great emphasis on the issues that surround the running of these practices and the personal financial implications. For both doctors and dentists e.g. budgetary control, pensions, succession, profitability, business structures incorporation and tax issues.

Location: London

Date: 26 Feb 2015

Legal

Objectives:

Our Legal firms are faced with daily challenges and as a group working in the professional market we focus on training our members to the highest standard to help and assist their clients in surviving these difficult times. This includes having expert speakers on important topics such as succession, tax, PII, compliance issues, profit improvement and SAR updates.

Location: London

Date: 7 Oct 2015

Property & Construction

Objectives:

To improve members awareness of current issues in the Property and Construction Industry and to build a forum to discuss such issues. An annual training course is held with leading speakers from the industry on a range of topics from compliance to tax planning, from investments to obtaining planning permissions.

Location: London

Date: 23 Sep 2015



Business Strategy

Objectives:

Each year we organise training for our panel members. This is designed to give them exposure to experts in the field from outside the group, to gain exposure personally by contributing training sessions on their areas of expertise, and by providing case studies of client work for members to review. We occasionally collaborate with other specialist panels in providing training and this year are working with the corporate finance panel as there is a good overlap in our work.

Joint with Corporate Finance

Location: London

Date: 14 May 2015

Location: Leeds

Date: 1 Oct 2015

Corporate Finance

Objectives:

Our training days provide a focussed opportunity to develop corporate finance skills specific to the SME sector, including transactional advice on mergers and acquisitions, valuation and fundraising. Our training days cover latest regulatory issues, sourcing targets, marketing and selling techniques, valuation techniques, transaction tax issues. The days also provide an opportunity to network with peers from across the country involved in providing corporate finance advice and to share experiences and make deals.

Joint with Business Strategy

Location: London

Date: 14 May 2015

Location: Leeds

Date: 1 Oct 2015

Forensic Accounting & Dispute Resolution

Objectives:

A rolling programme of training for those actively involved in dispute resolution to ensure they are up to date with current thinking and focusing on core skills of Experts, including Civil and Criminal procedure rules, report writing and Court Room skills.

Location: London

Date: 4 Jun 2015



International

Objectives:

Many of our SME clients are increasingly becoming part of the global economy. The training day will provide an opportunity for UK200Group members to come together and develop their skills and knowledge on international matters affecting their SME clients. Subjects will include topical international issues facing SMEs, how we can assist UK subsidiaries of international groups and how we can assist and benefit from clients wanting to export and set up operations overseas. Speakers will cover the commercial, accounting and taxation considerations and will be drawn from International Panel members, UK200Group International Associates and other international external organisations.

Location: The Belfry, Midlands

Date: 11 Nov 2015

Tax

Objectives:

Speakers from the specialist Tax Panel plus leading barristers and other tax professionals come together to provide UK200Group members and guests with high level technical training, legal updates, breaking news and hot topics from across the spectrum of direct and indirect tax. The focus of the Tax Training Day is the SME and what member firms need to know to ensure they are providing the best possible tax advice and support to their clients.

Location: London

Date: 21 Oct 2015

Please note:

- **Prices will be available with the Agendas and Registration Forms when released**
- **2nd delegates are eligible to a 20% discount**
- **50% surcharge for non UK200Group members**

For more information please contact Dee Bates on
+44 (0)1252 401050 or
+44 (0)1252 350733 or
dbates@uk200group.co.uk



Annual Conference

Objectives:

The Annual Conference is the Group's largest event and brings together UK200 member firms and high quality external speakers over two days. Attendees benefit from genuine skills development and the opportunity, unique to our organisation, to network in a non-compete environment. Conclusions of the confidential group-wide benchmarking of firms are also fed back at this event.

Location: The Belfry, Midlands

Date: 12-13 Nov 2015

Business Recovery & Insolvency Forum

Objectives:

Following the re-launch of the forum it is planned to hold an annual meeting of the forum members in order to share experiences of referrals from UK200 Group members, and to discuss any new initiatives that may be appropriate. In addition we hope to build relationships between members of the forum to enable the referral of work between each other.

Location: Birmingham

Date: TBA

COLP & COFA Forum*

Objectives:

The roles of COLP and COFA carry major responsibilities for compliance in legal firms. To that effect this self help support network for member firms enables discussion of pertinent issues affecting the running of firms due to changes required by the new SRA rules.

Location: London

Date: TBA

Freelancers & Contractors Forum

Objectives:

Launched in 2014, the Freelancers and Contractors forum allows UK200 members specialising in one of the fastest growing sectors in the UK economy to share expertise.

Location: London

Date: 5 Mar 2015

IT Forum

Objectives:

A forum dedicated to pooling expertise and experience, enabling member firms to make better and more informed practical choices regarding IT, both within their firms and dealing with their clients.

Location: London

Date: 10 Mar 2015

Lawyers Group Meeting

Objectives:

These sessions are attended by lawyer members and cover strategic development, practice management, business development, finance and legal market issues together with selected issues. Accounting members are very welcome to come to the meetings. The dual objective of a lawyer membership of effectively providing services to fellow accountant members and, to create a platform that generates productive discussion on practice and market issues amongst lawyer members, is slowly but successfully being realised with the UK200Group.

Location: London

Date: TBA

Cost: Free to members

Managers Forum*

Objectives:

Aimed squarely at non-partner senior accountants and lawyers within member firms, these annual one day events provide a supportive environment for senior members of staff to build the non-technical skills to progress within your firm.

Location: London

Date: 16 Jun 2015

Managing Partners Forum

Objectives:

Provides an opportunity for partners and directors involved in the management of larger firms in the group to benchmark their firms against their peers, and discuss key issues particularly relevant to firms of that size each year.

Location: London

Date: 22 Sep 2015

Practice Forum

Objectives:

Targeted and topical one day event providing a valuable platform for promoting best practice in member firms. Topics cover both soft skills and technical matters important to UK200 members and this, combined with shared member experiences results in events not available on the open market.

Location: London

Date: 21 Apr 2015

Please note:

- Prices will be available with the Agendas and Registration Forms when released
- 2nd delegates are eligible to a 20% discount*
- 50% surcharge for non UK200Group members



Informal Dinners

Objectives:

Held around the country and limited to UK200Group members only, these less formal gatherings allow members to meet with like-minded individuals to discuss topics pertaining to their practices and the Group itself. Members can attend any dinner they wish although most choose the venue closest to them.

Location	Date
Essex/Cambridge	TBA
London	TBA
Midlands/North West	TBA
North East	TBA
South	TBA
South Wales/Bristol	TBA
Yorkshire	TBA

Marketing Forum

Objectives:

Facilitated by Jo Edwards of JE Consulting, these forums are held 4 times during the year in the North, West Midlands, London and South West. They are in a workshop format with a core agenda of practical marketing activity for the professional practice where member attendees learn of new techniques and share experiences and views on what worked or did not work for their firm.

Location	Date
West	28 Apr 2015
North	12 May 2015
South	27 Oct 2015

Free to members

Quality Workshop

(Improving Business Performance)

Objectives:

The overriding objective of the day is for members to discuss in a non compete environment with fellow members relevant and topical issues on how keeping up and implementing standards can help firms improve profitability and to go away with "Golden Nuggets" to take back to your own practices.

Location: London

Date: 28 Apr 2015

For more information please contact Helena Whitford on +44 (0)1252 401050 or +44 (0)1252 350733 or hwhitford@uk200group.co.uk



IAPA Conference and Events

IAPA Fly-In/Fly-Out

Event for Young Professionals

Location: Barcelona, Spain

Date: 24 Apr 2015

Location: Hungary

Date: Sep/Oct 2015

European Conference

Location: Lisbon, Portugal

Date: 5-7 Jun 2015

US Regional Conference

Location: Washington DC, USA

Date: 26-27 Jun 2015

Latin-American Conference

Location: Antigua, Guatemala

Date: Sep 2015

BHD Conference

Location: New Brunswick
Canada

Date: Sep 2015

IAPA Deutschland

Location: TBA

Date: Nov 2015

IAPA International & IAPA Asia Pacific

Location: Hong Kong

Date: 15-18 Nov 2015

For more information please contact Joy Lord on +44 (0)1252 267880 or j.lord@iapa.net www.iapaevents.net



Industry Group client newsletters

These are client newsletters and are personalised for members of the Industry Groups with their own logos and available to all members in a UK200Group branded version. They offer not only an effective communication tool that has topical news articles and issues in the sectors, but also effectively illustrate to clients and prospects members' expertise in belonging to UK200Group and/or the UK200 Industry Groups.

Agriculture:

Published: Jan 2015

Jul 2015

Charities:

Published: Apr 2015

Oct 2015

Healthcare:

Published: Mar 2015

Sep 2015

Legal:

Published: Autumn 2015

Typical costs:

- **UK200Group branded**
150 copies – £130
- **Personalised**
150 copies – £192

e-newsletters

Property & Construction bulletin

Published currently 3 times per year this bulletin has 5-6 articles on both financial and market issues affecting the sector. The members have the option to post it on their website or email to clients/prospects as appropriate.

Agriculture e-bulletin

Published every month, this is a useful bulletin for members who have clients in this sector. It provides effective information on specific agricultural issues for accountant members. It is also emailed to the Institute of Agriculture Secretaries and the British Institute of Agricultural Consultants for distribution to their members.

Charities & Education bulletin

Published 3 times per year this e communication has a focus on structural, governance and legal issues within the sector that potentially can be of interest to clients/prospects of members.

Agriculture bulletin

Launched in 2014 this monthly bulletin written in the main by members of the UK200Agriculture Group, comments on both breaking sector news and business issues which can be then posted on member websites or e mailed to clients as appropriate.

Cost: Free to members

UK200Group e-news

e-news provides members with important information and updates. It gives an opportunity for members, international associates and prime partners to share their news with the membership monthly. Please email your articles to **Jan Hay** on **janeth@uk200Group.co.uk**

Cost: Free to members

Leaflets

Academy forum

This UK200Group Academy Forum leaflet is designed to effectively support those members who are targeting the Academy sector. It covers all the key elements a school should know about and adopt for a sustained successful conversion to Academy status, underpinned by the quality assuredness and expertise of the members in the Academy Forum.

UK200Group Member

This communication is about telling businesses of the attributes of accountants as members of UK200Group. It essentially describes how, as quality assured members and their ability to access specialist knowledge and expertise within the membership, they provide a more effective and competitive service to clients.

UK200Group - Industry Groups

Where the above leaflet was for targeting general business this one is defining the same attributes of members but in the more specialist sectors of agriculture, healthcare, charities and legal.

Cost: Free to members

PR

Members weekly media articles

A weekly article is emailed to member firms and uploaded onto the UK200Group website. These are written as generic articles on a range of topics that can affect businesses ranging from tax, employment, finance, and the economy. Members can download these and personalise them by inserting their name into their chosen article(s) and send it to the local press for publication.

Cost: Free to members



Press Panel

Volunteer members from around the Group respond to a daily question from our PR Agency concerning topical items about tax or business affairs. These personal comments and observations on the current affairs affecting business are frequently published in the press and sometimes lead to requests for full articles on items covered. These press comments help enhance to the business community that the members of the Group are abreast of the latest issues. Any member of the Group can be included within the panel; it does not need daily response just those that you wish to make observations on. These comments are distributed under the individual's name together with that of their firm. These also appear under Latest News on the website.

Cost: Free to members

Blog

A weekly blog written by members of the Group on a rota basis. The blog covers a wide range of topics and views and is designed to create dialogue within the business community. The blog can be found at <http://blog.uk200group.co.uk/> and the contents are already circulated amongst members and on the Twitter and Linked In communities. If you would like to be added to this rota contact the Centre.

Cost: Free to members

For more information please contact Dee Bates on
+44 (0)1252 401050 or
+44 (0)1252 350733 or
dbates@uk200group.co.uk

'taxtalk' e-bulletin

Published every 5 weeks **taxtalk** contains articles written exclusively by Tax Panel members for the benefit of all members of UK200Group. The issues covered are wide ranging and include case studies, planning advice and news on VAT, IHT, CGT and more. Which effectively offer members some insight into situations which could relate or apply to their clients.

Cost: Free to members

'Infocus' lawyers booklet

The UK200Group lawyers showcase their specialist knowledge to all members of UK200group in this booklet published 3 times per year. The subjects cover a wide spectrum of legal matters ranging from company and employment issues through to private and family issues.

Cost: Free to members

'Infocus' experts update booklet

This publication offers case studies, practical advice and breaking news from all the UK200Group expert panels including tax, corporate finance, forensic, business strategy and international. Written by members of these panels it provides both effective technical information and a list of firms details who are members of these panels.

Cost: Free to members

Charities & Education Practical Handbook

This book is published every 3-4 years when sufficient developments of issues within the sector have occurred, or are occurring. The type of subjects covered include: Charities Act updates, governance, tax, risk management, accounting and financial reporting, instructing investment managers and fundraising.

The book has potentially a dual role to play as firstly technical support for UK200Group members, and secondly as a marketing tool for UK200Group members in particular for the Charities Group members who can have these books personalised with their own logo.

New issue Spring/Summer 2015.

Cost: circa £100 + VAT

For more information please contact Dee Bates on
+44 (0)1252 401050 or
+44 (0)1252 350733 or
dbates@uk200group.co.uk



Practice Tools

Risk Management 'Calculator'

This tool originally designed by UK200Group members, is essentially a questionnaire the purpose of which is to collect and process key data about businesses that indicate their overall current financial performance. This information will then be key indicators in assessing the business's liquidity, profitability, capital investment and growth potential etc.

As well as the general business version there are tailored versions to suit the needs of GP, dental and farm businesses.

Cost: Free to members

PROFITWATCH™

Auto analyst tool:

Developed by the UK200Legal Group members as a profit forecasting tool for lawyer practices, this versatile auto analyst product can be equally applied in other professional firms that have a fee based income structure. The data input allows firms to project potential profit and reciprocally when inputting a desired profit, it will indicate resources in people and finance needed to achieve it.

Cost: £250 + VAT

e-member enquiry system

A simple email process initiated from the UK200Group website and managed by the Centre, that members can use to ask the membership for their input on any subject on which members may require information.

Cost: Free to members

SME Valuation Index

This index has been created from data provided by UK200Group corporate finance members own purchase and sale transactions of their client businesses. It has been widely recognised as being both much more user friendly in its format and more accurate in actual SME valuation.

This data will be sought after by agencies such as banks, corporate financiers, insolvency practitioners, investors, tax planners etc.

Cost: Free to members

PowerPoint presentations

Banks:

Designed with banks and their clients in mind this powerpoint has all the UK200Group member attributes of quality accredited, access to wide expert resource and continuous training and development. It can be downloaded from the UK200Group website and used by members when they are presenting to banks in their region.

Member staff:

This presentation is designed to communicate and enforce, to members' managers and senior staff, what being part of a quality assured Group means in terms of delivering overall benefits to their firm. Again this is downloadable from the UK200Group website.

Cost: Free to members

**For more information please
contact Dee Bates on
+44 (0)1252 401050 or
+44 (0)1252 350733 or
dbates@uk200group.co.uk**

Business Opportunities Register (BOR)

Acquisitions and Disposals can be advertised on this register.

Cost: Free to members

External Review Manual

Exclusive access to the Annual Review Manual and checklists used by UK200Group's external reviewers. This can be downloaded from the members' portal.

Cost: Free to members

Benchmarking

Each year all UK200Group members are invited to contribute to the Annual Benchmarking Survey. Unique in that only UK200Group firms can contribute, the submissions are confidential and overall results are fed back at the Annual Conference.

Cost: Free to members

Lifestyle

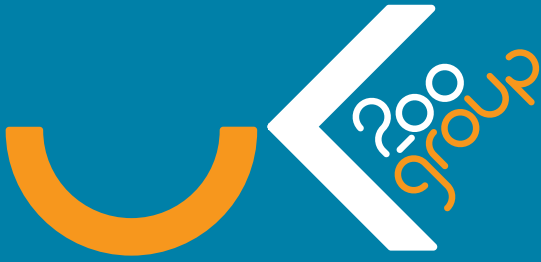
Lifestyle discount purchase scheme and Lifestyle Extras package has even more importance as an HR tool for members in this depressed economic climate offering significant savings for both necessary and more discretionary product purchasing in a wide range of areas e.g. travel, leisure, healthcare, motor, utilities and lots more.

Cost: £160 + VAT

Events calendar at a glance

2015	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Training												
Agriculture						25						
Charities & Education or Academies						11	1					
Freelancers & Contractors							8					
Healthcare		26										
Legal										7		
Property & Construction									23			
Business Strategy					14					1		
Corporate Finance					14					1		
Forensic Accounting & Dispute Resolution						4						
International											11	
Tax										21		
Conference and Forum												
Annual Conference											12-13	
Business Recovery & Insolvency Forum ●												
Freelancers & Contractors Forum			5									
IT Forum			10									
Lawyers Group Meeting ●												
Managers Forum						16						
Managing Partners Forum									22			
Practice Forum				21								
Quality Workshop				28								
All Chairs Meeting										8am		
Main Committee Meetings												
Executive Committee		13	6		22	26			16	8pm	11	4
Membership Services		12			21				17			3
Publicity & Promotions ●												
Quality Assurance & Standards	22				7				4			
Industry Group Committee Meetings												
Agriculture											27	
Charities & Education			4							15		
Healthcare						18						
Legal				22								
Property & Construction			27									
Expert Panel Meetings												
Corporate Finance												
Tax			24									2

● TBA



building
better
together.

UK200Group

3 Wesley Hall
Queens Road
Aldershot
Hampshire
GU11 3NP

T: +44 (0)1252 401050

or +44 (0)1252 350733

E: admin@uk200group.co.uk

W: www.uk200group.co.uk