

2015
Conference

Forging ahead together

The Belfry, West Midlands
11/12/13 November

building
better
together.



The David Turnbull Award

The late David Turnbull, founder of the UK200Group, was a great believer that members would really only get out of the UK200Group benefits in proportion to the contribution they themselves made.

It is appreciated that attending the UK200Group Annual Conference is a great contribution both in money but also in time. In honour and memory of David we would like to reduce the level of that contribution so that partners or potential partners of member firms who have not previously experienced a Conference may understand more fully the benefits of membership and the ethos of members and the Group.

The winners of the award last year saw this initiative as a very positive experience as you can see from the testimonials received and to this end we are offering a limited number of 'free places' once again.
(Free=Packages A, D, E, F, G)

In order to benefit from this Award you must apply by close of business **Friday 11 September 2015** giving reasons why the individual might be granted this award.

The applicant must be:

- From a member firm who have already booked or will be sending at least one paying delegate to the 2015 Annual Conference
- A representative who has not previously attended the Annual Conference
- Prepared to send a short summary of how they enjoyed, benefited or otherwise from attending the Conference.

The application for the award must be accompanied by a maximum of 50 words, as to why the individual should be selected to attend under the award. There is no guidance as to what the criteria might be – it could be humorous, technical, or tongue in cheek but hopefully will demonstrate the UK200Group ethos and association benefit.

The number of places covered by the Award is limited and successful applicants will be advised by close of business on **Monday 28 September 2015**.



Entries should be sent to
Helena Whitford, by email to
hwhitford@uk200group.co.uk

The decision making process is in no way open to challenge, appeal or complaint in any way whatsoever but will be made with the full knowledge of the regulations set out in the Bribery Act!

What our friends say...

David Turnbull Award Winners



"This being my first UK200 conference I was a little apprehensive about what to expect. I am delighted to say that thanks to the excellent organisation, entertaining speakers and friendly atmosphere I enjoyed the entire experience and would not hesitate to recommend it to others in the future. It was great to exchange views with like-minded professionals who face similar challenges to myself on a daily basis."

Peter Smith - JW Hinks LLP

"Thank you for awarding me one of the places on the David Turnbull Award for the 2014 UK200Group Conference. I found the whole event extremely well organised and thought provoking. I thoroughly enjoyed all the speakers, sessions and break out discussions. Being from one of the smaller practices, the UK200Group allows us an opportunity to hear some useful ideas that I was able to take back with me to consider for our firm. This was only possible because of the openness and honesty from all the delegates I met with. I look forward to future UK200 events."

Chris Calvert - Rushtons

"I feel very privileged to have been the recipient of the David Turnbull award and to attend the Annual Conference in Cardiff 2014. The whole two days were very fruitful in respect of what I took away from it. I would like to say thank you and how good it was to meet and talk with other delegates and reassure myself that we are all facing the same challenges. I found the conference extremely useful from a development and technical perspective, and I met a number of interesting people and experts to who I could refer to in the future should the opportunity arise. I would like to say thank you to all of the staff and organisers who made the conference run as smoothly and enjoyable as it did."

Terrance J Jones - WBV Limited

"I was very happy to be given the opportunity to attend the 2014 UK200 Group conference in Cardiff via the David Turnbull Award scheme. The conference covered a wide range of topics and enabled me to meet other like-minded professionals all facing the same commercial pressures and challenges."

"I found the discussion groups, both formally during the conference and informally at the dinners, very interesting and informative and came away with some positive ideas of how we as a firm and as part of the group can benefit from working together."

Richard Dilley - George Hay Partnership LLP

"I found the conference very enjoyable, it is a great place to meet like-minded people and I have obtained a better understanding of how the group and its members work together."

Carla Davis - Hart Shaw

Other feedback

I would just like to say thank you again for the efforts you made to create a really good conference.

Christopher Darwin - Thomas Coombs

Thanks so much for organising such a delightful conference, as always. It was most enjoyable and a great opportunity to meet up with colleagues from other practices.

Marjorie Bremner - BKL

Thank you for organising such a good conference once again - you should feel very proud of your efforts.

Peter Gillman - Price Bailey

12:30 REGISTRATION**12:50 LUNCH****14:00 WELCOME BY INTERNATIONAL PANEL CHAIRMAN**

David Stevens, Partner at Ellacotts

14:05 INTELLECTUAL PROPERTY – HOW EXPORTERS CAN MAXIMISE IP INCOME AND REDUCE RISK

Elizabeth Ward – Virtuoso Legal

For many of our clients, their most valuable asset is their intellectual property. From an exporter's perspective, Elizabeth will cover some of the key issues to consider to ensure that the IP is properly protected, and income is maximised.

14:45 HELPING OUR CLIENTS TRADE INTERNATIONALLY - MANAGING RISK AND RAISING FINANCE IN FOREIGN CURRENCY

Paul Smith, Head of Trade Finance, SME Banking - Lloyds Bank plc

Many of our clients will regularly buy and sell products or services internationally. Paul Smith, Head of Trade Finance, SME Banking - Lloyds Bank plc will share with us some typical methods and financial products that our clients can use to manage their foreign currency risk or raise additional funds.

15:15 NETWORKING BREAK**15:35 DOING BUSINESS IN**

Presentation by International Associates from:

- **France**
Spira Twist et Associés
- **Italy**
GMR Partners
- **Spain**
Marsal Abogados Y Asesores Tributarios
- **USA**
Gerson, Preston, Robinson & Co

16:15 IAPA – AN INTERNATIONAL RESOURCE

Stephen Hamlet
IAPA Chief Executive

Each accountant member of the UK200Group automatically belongs to IAPA. IAPA covers some 70 countries with over 200 member firms, allowing you to service your clients as they expand internationally, in addition to targeting those potential clients with global aspirations. IAPA's new CEO will introduce himself and discuss some of the benefits and values of the international association.

16:30 TRADE AND INVESTMENT IN THE USA

Alan Lips – Gerson, Preston, Robinson & Co – Miami

Thanks to our "special relationship" there are many UK businesses that have business interests in the USA. Alan will outline some of the key considerations when investing in the US including transfer pricing issues once trade has been established.

17:00 CLOSE**19:30 INFORMAL DINNER**

Bel Air Restaurant at The Belfry



SPEAKERS



David Stevens
Partner at Ellacotts
and Chair of the UK200
International Panel

David spent over 15 years at a Big Four and a mid-tier firm, and has worked with many international businesses in several countries including a 2 year secondment to Paris, France. David is head of Corporate Services for Ellacotts and has a portfolio of clients, most of whom trade internationally. As Chair of the International Panel, David represents the UK 200 Group at the IAPA AGMs and is also on the IAPA Membership Committee.



Paul Smith
Head of Trade Finance,
SME Banking - Lloyds
Bank plc

Paul Smith is the head of Trade Finance in Lloyds Bank's Global Transaction Banking division, supporting small and medium sized businesses. Paul has worked for Lloyds Banking Group for more than 31 years, and leads a team of 18 international business managers across the UK that support businesses with an annual turnover up to £25million through the different stages of their international growth strategy. Paul joined the Global Transactional Banking team in 2015 after a spell as area director for Lloyds Bank Commercial Banking in the North West and as a senior manager role in the bank's national Risk Management team.



Stephen Hamlet
IAPA Chief Executive

Stephen Hamlet graduated from Exeter University with a law degree, before moving to London to pursue a career in accountancy. Stephen trained with a Top 20 firm, qualifying as a chartered accountant. He moved into business development roles with increasing responsibility and worked for 6 years as BKR International's executive director for Europe, the Middle East and Africa. Stephen joined IAPA as their global CEO in July 2015.



Elizabeth Ward
Virtuoso Legal

Elizabeth Ward is a high profile expert in intellectual property. She runs her award winning firm Virtuoso Legal from a Leeds base, but has clients from all over the World. Although Elizabeth worked at a number of large national and international law firms, she decided that most firms did not truly service their client's needs and were too inwardly focused. Virtuoso Legal is therefore different from other firms, and is unique in its approach.



Alan Lips
Gerson, Preston,
Robinson & Co - Miami

Alan A. Lips, shareholder and partner, has been with GPR since 1995. Alan oversees the international tax and estate planning department, serving clients on a full range of matters, including corporate and investment structuring and planning for both inbound and outbound transactions, transfer pricing, pre-immigration tax planning, U.S. income and estate tax planning and compliance and financial reporting. Alan works with clients from all over the world seeking to acquire businesses as well as residential and commercial real estate throughout the U.S.



08:15 REGISTRATION**09:00 WELCOME BY CONFERENCE CHAIRMAN**

Peter Gillman – Consultant to and former Managing Director of Price Bailey

09:20 THE ECONOMY

Justin Urquhart Stewart – 7IM

Back by popular demand Justin will once again give an account on the state of the Economy in his unique insightful and entertaining way.

10:30 BENCHMARKING

Charles Olley – Price Bailey

As long term finance director of one of our larger members, Charles has had the awkward task of reporting financial outcomes and predictions to roughly 25 Chartered Accountants, and others, at more conferences than he cares to remember. Something approaching a hundred, he jokes. Charles' powers of analysis will be thoroughly tested as he presents the results of the UK200 2015 benchmarking survey.

11:10 COFFEE BREAK**11:40 DISCUSSION GROUPS**

This once again will be an invaluable session giving the opportunity for members to discuss and exchange ideas amongst peers. This demonstrates the value of being a member of the UK200Group.

12:50 LUNCH**14:00 SUCCESSION PLANNING**

Mike Sturgess – SWAT

Succession is probably the biggest issue facing the profession. The old solutions may no longer work, so firms must consider different approaches. This session will consider the options open to practitioners; how to value a practice; what other factors impact on price or the attractiveness of the practice; and how practitioners can fund their retirement in the future.

15:00 CORPORATE FINANCE

Simon Blake – Price Bailey

Thought leadership campaign – valuing a company on a debt and cash free basis.

Adding value for clients – top ten tips

Corporate Finance Index update

15:35 TALES FROM THE TWILIGHT ZONE – PROBATE IN PRACTICE?

Amanda Freeman – Myerson

Probate – a quiet backwater where nothing ever happens – or is it? From maintaining Florida swimming pools to valuing china tea sets, there's never a dull moment and that's before you get to the warring beneficiaries... True tales and top tips from a life in the dead zone.

16:10 TEA BREAK**16:30 AGM (MEMBERS ONLY)****19:00 DRINKS RECEPTION****19:45 DINNER**

John Sergeant – after dinner speaker

23:00 CHARITY EVENT

SPEAKERS



Peter Gillman,
Consultant to and
former Managing
Director of
Price Bailey



Mike Sturgess
SWAT

Mike is the Chairman of SWAT UK Limited. Through his involvement with accountancy practices over his 30 years at SWAT UK he has gained a wide range of practical experience. He has worked with managing partners to help them create written strategic plans with partner KPIs, and has undertaken independent partner appraisals for a number of firms. He runs partner retreats, and helps firms tackle specific issues such as decreasing lockup or increasing productivity and recoverability. He also heads up the SWAT UK team handling Practice Mergers and Acquisitions.



Amanda Freeman
Myerson

Amanda has many years' experience of dealing with a wide range of matters, particularly for high net worth individuals. Amanda is a member of the Society of Trust and Estate Practitioners (STEP) and has particular experience in dealing with Wills and inheritance tax planning, the administration of estates and trusts, powers of attorney and planning for the elderly. She studied Law at Sheffield University before working at Elliott and Company (now part of DWF), Addleshaw Sons & Latham (now Addleshaw Goddard) and Haworth Holt Bell. She joined Myerson in 2011.



Justin Urquhart Stewart
7IM

Justin is one of the most recognisable and trusted market commentators on television, radio, and in the press. In early 2001, he co-founded Seven Investment Management (7IM), which now manages and administers around £6 billion on behalf of professional financial wealth managers, intermediaries and their clients. Justin has a keen interest in developing the investment market to break down as many of the traditional barriers as possible for both private investors and smaller companies. Practice Mergers and Acquisitions.



Simon Blake
Price Bailey

Simon is the Chairman of the UK200Group Corporate Finance Panel - Simon's role includes lead advisory work on strategic corporate finance activities primarily for private limited companies and their owners, and covering mergers, acquisitions and disposals, management buy-outs and management buy-ins, fund raising, valuations and commercial re-organisation.



John Sergeant
After dinner speaker

Since emerging into the public eye on the receiving end of Margaret Thatcher's handbag in 1990, John has become part of Britain's public consciousness. He joined the BBC in 1970 and for two years covered European affairs and the first sessions of the directly elected European Parliament. He left the BBC and joined ITN in March 2000 as Political Editor but stood down after only three years in the job. He has now returned to his love of light entertainment and has appeared as a guest in Have I Got News For You (which he has chaired), Room 101 and the News Quiz on Radio 4. In 2002 John published his memoirs, Give Me Ten Seconds. In 2005 he released a book on Margaret Thatcher - Maggie: Her Fatal Legacy.



Charles Olley
Price Bailey

Alongside his Financial Director role at Price Bailey, Charles heads the firm's tax consulting team, providing leadership and grey matter when client affairs get complicated.



09:00 REGISTRATION**09:30 PRIZE GIVING****09:45 UK200GROUP**

James Abbott – Abbott Moore

The next 30 years and maximising member benefits.

10:00 EMPLOYEE SHARE OPTION SCHEME – CURRENT PRACTISE NEW OPPORTUNITIES

Robert Postlethwaite – Postlethwaite

Tax planning the Government does want your clients to do: improving company performance through employee share ownership, with two new tax reliefs.

10.45 COFFEE BREAK**11:10 TOPICAL TAX TIPS**

Giles Mooney – PTP

Keeping up to date with the latest tax planning ideas and tips is a challenge for the busy accountant and tax adviser. Giles will discuss the latest ideas affecting owner managed businesses and individuals in this session.

12:30 ON LINE REPUTATION MANAGEMENT - CREATING AN ONLINE BRAND FOOTPRINT AND KEEPING IT POSITIVE

Jo Edwards – JE Consulting

The internet and social media platforms are fundamentally changing the way that clients find and engage with their professional advisers. This presentation sets out the ways in which client behaviour is and has changed and the implications for your firm's marketing processes, systems, and methodology for brand management. It will also explore how your firm can benefit through engagement with UK200Group's on line channels.

Content:

The new moment of truth – clients are doing more research before they talk to you.

Clients do not shop around – they seek peer recommendations... online

How wide is your online footprint?

Do you have a positive online reputation?

How do you create a positive footprint and build upon that?

How to engage with and benefit from the UK200Group channels?

What happens when it goes wrong?
– damage limitation and on line reputation management techniques.

13:00 LUNCH**14:00 LEADERSHIP THROUGH ENTREPRENEURSHIP- HOW AN ENTREPRENEURIAL MINDSET CAN CREATE A PERFORMANCE CULTURE**

Sahar Hashemi – Entrepreneur

Sahar believes that entrepreneurship is not about personality, nor is it restricted to startups. It's a set of habits that anyone can learn – habits that are becoming increasingly important in every organization. To keep up with the pace of innovation, companies need to go back to their entrepreneurial roots. They need to behave much more like a start up- more agile, curious, creative, resourceful and connected to customers; less rigid and complacent.

By sharing her story of building Coffee Republic from her kitchen table, she will shed light on the entrepreneurial mindset and then the cultural transformation when a start up becomes an established business. She will share 6 practical easy habits which she believes foster entrepreneurial behaviour in established businesses.

15:30 CLOSE

SPEAKERS



James Abbott
Abbott Moore

Following six years as tax partner heading up the tax team for a four partner firm, in 2012 James Abbott became founder of Abbott Moore based in mid Bedfordshire. Combining leading a rapidly expanding practice specialising in small businesses with being recognised as an expert in freelancers and contractors, he is also UK200Group's Vice President. He is passionate about ensuring UK200 firms leverage the benefits of their UK200 membership, including facilitating the Managers' Forum for senior team members together with chairing the recently formed UK200 Freelancers & Contractors Forum.



Jo Edwards
JE Consulting

Jo Edwards is the principal of JE Consulting, who specialise in providing marketing assistance to accountancy and legal firms. Jo has over 30 years practical marketing experience working with a wide range of firms across the UK, both large and small and has a particular specialism in preparing and delivering internet and social media strategies to clients. Jo and her team's "hands on" approach to marketing has helped many firms across the country, to generate new clients and develop profitable cross-selling services to existing clients through innovative e-marketing programmes.



Robert Postlethwaite
Postlethwaite

Robert is founder and Managing Director of Postlethwaite, an UK200Group member law firm specialising in employee ownership. Employee-owned itself, Postlethwaite helps companies to design and implement a range of different employee share ownership plans, ranging from majority employee ownership using employee ownership trusts to share option plans for technology and other growth companies.



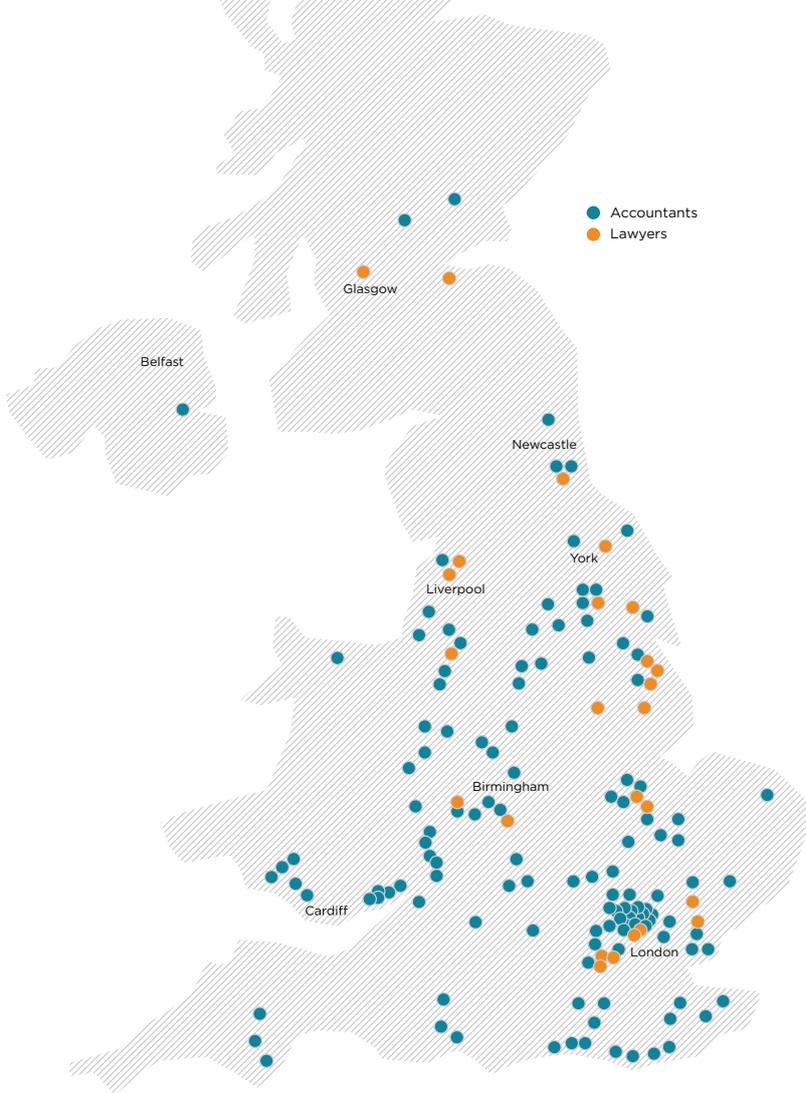
Sahar Hashemi
Entrepreneur

Sahar Hashemi is an internationally recognized thought leader and speaker on innovation, leadership and entrepreneurship. Her presentations are unique, blending her story of building two famous brands with the key habits for innovation and creativity. Sahar founded Coffee Republic, the UK's first US style coffee bar chain with her brother and had over 110 bars and a turnover of £30m. In 2005 she founded skinny Candy, labeled "hip" by vogue magazine and sold to confectionery conglomerate Glisten plc in 2007. Her bestselling book *Anyone Can Do It* - has been translated into 6 languages and is 2nd-highest selling book on entrepreneurship after Richard Branson. In June 2012 Sahar was awarded an OBE for services to the UK economy and to charity.



Giles Mooney
PTP

Giles is a Chartered Accountant and Tax Adviser and has been involved in UK tax training for almost twenty years. Giles started his career with a small firm of accountants and tax advisers, before working as a director of a large professional training company. Giles is an entertaining and educational speaker and can be seen presenting TAXtv, AccountingTV and frequently heard on BBC radio five live and local radio discussing tax and business issues.



We've got it covered

Members' geographic distribution

UK200Group Chartered Accountant and Lawyer member firms offer strategic business support servicing key industries throughout the UK, in over 150 locations.

Global support extends to over 70 countries through UK200Group International Associates and the Group's membership of IAPA – a global association of independent accounting firms and groups

Friends in high places

Business partners and exhibitors



UK200Group
 3 Wesley Hall, Queens Road,
 Aldershot GU11 3NP
 Tel +44 (0)1252 401050
 Tel +44 (0)1252 350733
 admin@uk200group.co.uk
 www.uk200group.co.uk



Abbey Tax Protection
 Fee Protection
www.abbeytax.co.uk



First Corporate Law Services
www.fcls.co.uk



JE Consulting
 Marketing/PR Services
www.je-consulting.co.uk



Mercia Group Ltd
 Technical Training Support
www.mercia-group.co.uk



ntegrity
 Professional Insurance
www.ntegrity.co.uk



Online50
 Online Accounting Client
 Collaboration Cloud Computing
www.online50.net



Seven Investment Management
 Wealth Management
www.7im.co.uk



OCREX
 Ocrex
 Data Capture Solutions
www.ocrex.com



Premium Credit
 Fee Plan
www.premium-credic.co.uk

Take a closer look

Information about this year's conference

CONFERENCE CHARITY:



WEDNESDAY INFORMAL DINNER:

Bel Air Restaurant at The Belfry

CONFERENCE AND GALA DINNER VENUE:

Woodlands Conference Suite at The Belfry

DRESS CODE:

Informal Dinner – Smart Casual
Conference – Smart Casual
Thursday Conference Gala Dinner – Business Suits

HOTEL LOCATION AND DIRECTIONS:

The Belfry
Wishaw
Sutton Coldfield
West Midlands
B76 9PR

PARKING:

1000 complimentary car parking spaces available on site

BY TRAIN:

The hotel is a 20 minute drive from New Street Station

BY AIR:

Birmingham International Airport is 10 minutes away from the hotel.



UK200Group 30th Annual Conference

Both the Accountancy and Legal professions have changed in many ways over the last 30 years and will no doubt continue to do so in the years ahead.

Through our membership of the UK200Group we as members benefit from the quality procedures, technical support and training, business development and management support.

International links gives members the global reach that is an essential part of supporting client needs.

The topic for this year's conference "Forging ahead together" recognises that opportunities for us all as individual member firms exist where we collaborate and share our knowledge and experience.



www.uk200group.co.uk