

# Seminars, workshops and presentations in 2010



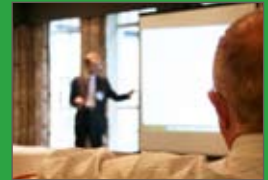
**BARNES ROFFE LLP**  
CHARTERED ACCOUNTANTS

# Introduction

There is no denying that 2009 was a tough year for many UK businesses including a large number of our clients. There may be a glimmer of light on the horizon for 2010 but no-one knows for sure.

For this reason we have tailored our 2010 seminar programme to offer practical help, advice and education to our clients in these difficult times. We hope we will be able to help our clients not only survive, but thrive in the future.

Michael Parkinson BSc ACA



# Year at a glance 2010

Barnes Roffe Presentations

January	Wills and inheritance tax planning update	Stephen Corner	14/01/10
February	Beware! The 50% tax rate is arriving!	Tony Lundberg & Andrew Kent	11/02/10
March	The Budget 2010 - a breakfast seminar	Stephen Corner	date tbc
April	'Compulsory pension requirements?'	Mike Tattum	22/04/10
May	Forms P11D - problems and pitfalls	Tony Lundberg	20/05/10
June	Knowing your numbers	Sheryl Davis	17/06/10
July	Top tips to maximise profits	David Aston	08/07/10
September	Have you picked the right person for the right job?	Jan Kaye	23/09/10
October	Understanding your financial statements	Sheryl Davis	14/10/10
November	Wealth protection for you and the next generation	Mike Parkinson	18/11/10
New in 2010	'From book keeping to management accounts'	Jacqui Williams	dates tbc

# Wills and inheritance tax planning update

# January



**Barnes Roffe Tax partner Stephen Corner will outline the latest thinking on ways to save inheritance tax by using a variety of mechanisms.**

Stephen will share some ingenious ways of passing on family wealth including the use of schemes designed by the Barnes Roffe tax partners and approved by leading tax counsel.

If wealth protection and passing assets on to family members is of prime interest for you, then this seminar is a must.

Date

Thursday  
14<sup>th</sup> January 2010

Time

4.00pm-6.00pm

Presenter

Stephen Corner  
Barnes Roffe LLP

# February

## Beware! The 50% tax rate is arriving!

Date

Thursday  
11<sup>th</sup> February 2010

Time

4.00pm-6.00pm

Presenter

Tony Lundberg &  
Andrew Kent  
Barnes Roffe LLP

**You will all be aware that the top rate of tax will soon be increased to 50%. What many of you won't know is that in certain circumstances the effective rate of income tax can be 60%.**

Intelligent tax planning has never been more important and Barnes Roffe tax managers Tony Lundberg and Andrew Kent will outline some practical ways to minimise your tax liabilities by:-

- Equalising income between spouses.
- Manipulating the way you draw income in each tax year.
- Avoiding the loss of your personal allowance.
- Reviewing your level of pension contributions.
- Producing gains rather than income.
- Considering income levels in retirement.

Whilst this seminar will be particularly useful to those taxpayers with incomes in excess of £100,000, it will also offer practical tips to married couples who wish to avoid unnecessary taxes in the short and long term.



# The Budget 2010 - a breakfast seminar

# March



## **What impact will the budget have on you and your business?**

Come along to our budget 2010 seminar and enjoy a full English breakfast as well!

As usual, Barnes Roffe Central London office partner Stephen Corner will be giving his popular one hour presentation on the morning following the 2010 Budget.

Stephen will give you a brief overview of the main points of the budget and explain any impact this will have on you and your business.

At the time of going to print the budget date has not been announced but we will put details of this seminar on our website, [www.barnesroffe.com/client-zone/seminars](http://www.barnesroffe.com/client-zone/seminars). Once the exact date is known we will also send out our usual invitations by e-mail.

Date

March 2010  
date tbc,

Time

8.00am-9.30am

Presenter

Stephen Corner  
Barnes Roffe LLP

# April

## 'Compulsory pension requirements?'

Date

Thursday  
22<sup>nd</sup> April 2010

Time

4.00pm-6.00pm

Presenter

Mike Tattum, MD  
Professional Assured  
Financial Services Ltd

### **"A message to all employers - your country needs you!"**

For many years UK pensions have struggled with falling returns and diminishing benefits. People are saving less for their retirement and employers are closing down final salary schemes.

To try and arrest the situation, the Government has announced tough action that will impact all employers and potentially 10 million or more employees!

Come to our presentation to hear about the new pensions regime that we will all have to pay for. In addition, Mike Tattum will provide an update on other topical issues.



# Forms P11D - problems and pitfalls

# May



**The submission of incorrect Forms P11D can lead to interest and penalties for the employer and possibly the employee as well. Stringent deadlines apply and in the not too distant future all forms will have to be submitted electronically.**

This is one of our most popular seminars. Tony Lundberg will show delegates how to complete forms P11D and set out exactly what information is required. He will also talk about obtaining a “dispensation” which is a means to avoid a large amount of the P11D compliance work.

This seminar is ideal for anyone involved in the P11D process at any level and is designed to offer practical help and advice.

Date

Thursday  
20<sup>th</sup> May 2010

Time

4.00pm-6.00pm

Presenter

Tony Lundberg  
Barnes Roffe LLP

# June

## Knowing your numbers!

Date

Thursday  
17<sup>th</sup> June 2010

Time

4.00pm-6.00pm

Presenters

Sheryl Davis  
Barnes Roffe LLP

**Up to date management information is crucial to the wellbeing of any business. Accurate budgets and cash flow statements have never been more important.**

Knowing how to prepare these will enable you to be more aware of the day to day state of your business and avoid any unforeseen problems.

Barnes Roffe partner Sheryl Davis will go through the principles of preparing a budget and then go on to show how to forecast your cash flow from the budgeted figures.

This “workshop” presentation will give the delegates the opportunity to carry out some real examples which will help them really understand how the process works.



# Top tips to maximise profits

# July



**Profits are the life blood of any organisation. Without profits the business cannot survive in the long term. Profitability can be attacked from a seemingly endless variety of places.**

All businesses are looking for ways to maximise profits and at this seminar Barnes Roffe Senior Audit Manager, David Aston will tell you about our ten top tips to put substantial amounts on your bottom line.

Come along and find out:

- Why doing nothing is not an option.
- Simple tips you can implement immediately to substantially increase your profits.
- The power of the penny.
- How to identify and take advantage of your key profit drivers.
- The importance of a strong pricing strategy.
- The Management Information you must produce to maximise profits.

Date

Thursday  
8<sup>th</sup> July 2010

Time

4.00pm-6.00pm

Presenter

David Aston  
Barnes Roffe LLP

# September

## Have you picked the right person for the right job?

Date

Thursday  
23<sup>rd</sup> September 2010

Time

4.00pm-6.00pm

Presenter

Jan Kaye  
Thomas International

**Anyone involved in the recruitment of staff will know that mistakes can be costly. With many more people in the job market at the moment it can be difficult to narrow down the field and ensure that you get the right candidates.**

Many of you will be aware of the use of “psychometric profiling” as a tool for successful recruitment. In this seminar our excellent guest speaker, Jan Kaye of Thomas International will show you how to maximise its effectiveness in the recruitment process.

Additionally, you will find out how this process can be utilised on existing key employees. Jan will explain the different types of personality to be found within any one workforce and suggest ways that you can improve both individual and team performance.



# Understanding your financial statements

# October



**Surprisingly experts have predicted that up to 60% of company directors are unable to properly read a set of accounts. Many don't realise that the balance sheet is probably far more informative about the state of a company's affairs than the profit and loss account!**

Most directors want to know:-

- How much money have I made?
- How much tax do I have to pay?
- Where is the money now?

This very popular presentation will give answers to these questions and a whole lot more. Delegates will also have the opportunity to raise any specific queries they may have.

Uxbridge office partner, Sheryl Davis, will give delegates practical help enabling them to better understand their statutory accounts. In 2009 this was our most highly attended seminar so book early!

Date

Thursday  
14<sup>th</sup> October 2010

Time

4.00pm-6.00pm

Presenter

Sheryl Davis  
Barnes Roffe LLP

# November

## Wealth protection for you and the next generation

Date

Thursday  
18<sup>th</sup> November 2010

Time

4.00pm-6.00pm

Presenter

Mike Parkinson  
Barnes Roffe LLP

**Many companies are sitting on large cash reserves and valuable assets which can be at risk from claims by creditors should the company encounter financial difficulties.**

Similarly many companies own valuable property which will be subject to the classic “double tax” charge when sold.

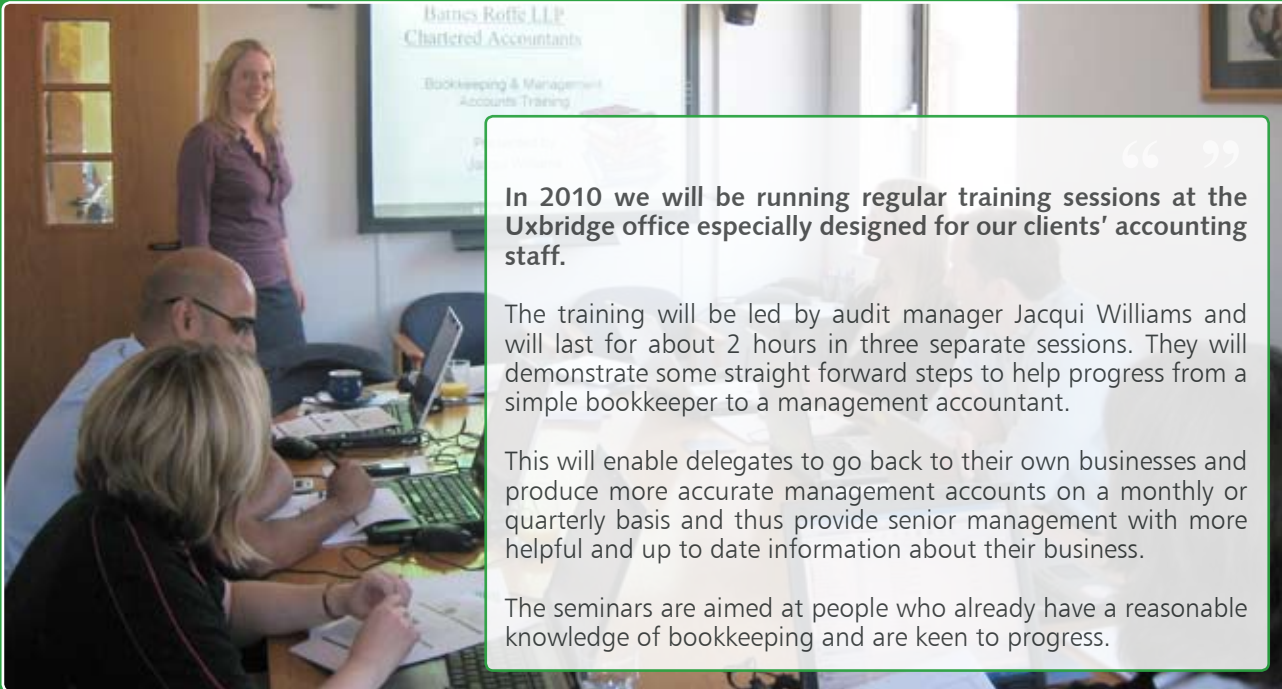
Barnes Roffe senior partner Mike Parkinson, will outline how the use of holding companies can help insulate cash and assets from attack, thus effectively “ring fencing” them from creditors.

He will also demonstrate how the use of limited liability partnerships (LLPs) can reduce the effective rate of tax on the sale of company owned property from 47% down to 18%.

This seminar is aimed at owner managers whose companies have substantial assets and/or cash balances.



# New in 2010 ... From book keeping to management accounts



**In 2010 we will be running regular training sessions at the Uxbridge office especially designed for our clients' accounting staff.**

The training will be led by audit manager Jacqui Williams and will last for about 2 hours in three separate sessions. They will demonstrate some straight forward steps to help progress from a simple bookkeeper to a management accountant.

This will enable delegates to go back to their own businesses and produce more accurate management accounts on a monthly or quarterly basis and thus provide senior management with more helpful and up to date information about their business.

The seminars are aimed at people who already have a reasonable knowledge of bookkeeping and are keen to progress.

## Find out more about Barnes Roffe

“ Barnes Roffe offers me a personal service, value for money and more importantly access to smart people whose expert advice has consistently helped me grow my business and save money in the process. ”

**John Mulhall,**  
**Financial Director - Exib Limited**

**Experience. The difference.**  
**[www.barnesroffe.com](http://www.barnesroffe.com)**

For those of you who are new to Barnes Roffe we have included a few pages of additional information which will tell you more about the services we offer, what makes us special and sets us apart from other accountants.

Please have a look through the rest of the booklet to find out about the partners in the Uxbridge office, the special in-house training that we offer to businesses and our unique approach to looking after our clients.

# Key People

Partner

## Michael Parkinson BSc ACA

Mike is a driven and enthusiastic service provider. He has a wide range of business and finance experience over 20 years:

- of start ups, fast track growth companies and more established and stable businesses.
- of various business sectors including retail, service, hotels, pubs and restaurants.



Enjoys dealing with detail but always with sight of the big picture. Mike accepts responsibility for contributing ideas/options to clients and wants to be part of the client's team.

Plain speaking, unpretentious and forms trusting and helpful relationships at all levels within the client company.

Substantial tax knowledge in areas of LLPs, corporate taxes as well as employee tax issues.

Telephone direct dial: 01895 276782  
E-mail: [m.parkinson@barnesroffe.com](mailto:m.parkinson@barnesroffe.com)

Partner

## Sheryl Davis ACA

Sheryl enjoys helping companies develop and gains much satisfaction from seeing the positive effect she has by working closely with her clients' teams.

In recent times she has been particularly instrumental in securing bank finance and facilitating the recovery of struggling companies.



Passionate about training and often assists clients and their staff as well as being responsible for the Barnes Roffe Uxbridge office training plan.

Keen on staff development and actively encourages people to learn new skills and progress their career to partner level.

Telephone direct dial: 01895 276787  
E-mail: [s.davis@barnesroffe.com](mailto:s.davis@barnesroffe.com)

Partner

## Stephen Corner LLB (Hons), FCA, Barrister



Stephen is one of our five specialist tax partners and is also a corporate barrister and chartered accountant. He heads up the firm's transaction department.

Able to provide multi-disciplinary services with over 25 years experience of legal, tax and accounting services.

Offers substantial property acquisition, development and tax experience gained from providing the lead advisory role to two substantial property companies. e.g. Stephen has assisted in the creation of a £1bn city property fund for one client and is currently managing director of a substantial marina development on the south coast.

A well recognised ability to simplify complex matters at both a technical and a professional advisor level.

Telephone direct dial: 020 7292 8880  
E-mail: [s.corner@barnesroffe.com](mailto:s.corner@barnesroffe.com)

Senior Manager

## David Aston BA FCA CTA

David joined the team in 2008 having previously been a partner in Baker Tilly. He has over 15 years experience as a qualified chartered accountant, is a qualified tax practitioner and specialises in business advice, accounting and taxation for owner managed businesses.



He has recently been promoted to Responsible Individual status which permits him to sign statutory audits.

Telephone direct dial: 01895 276791  
E-mail: [d.aston@barnesroffe.com](mailto:d.aston@barnesroffe.com)



WE  
BELIEVE  
YOU  
REQUIRE:

*Client requirements*

Access to a hardworking, proactive, straight talking, forward thinking team, offering you prompt professional help and advice.

A personal approach to your business in order to build a strong relationship and encourage the development of ideas for improvement.

Innovative tax planning ideas and strategic business planning.

People with technical skills that are second to none including specialist tax advice.

# IN RETURN WE PLEDGE:

## *The Barnes Roffe Service Pledge*

To exist for your benefit – not ours.

To provide a proactive and creative accountancy, audit and tax service led by our most experienced people.

To provide a personal, friendly service at all staff levels, by all our people.

To take responsibility for our role in your team, work with you and take pride in being part of your team.

To enable easy access to all team members, for instance, no call monitoring at all, mobile phone contact numbers for our senior staff and partners.

That you will benefit from an excellent service, overseen by your allocated partner, controlled and delivered by the firm's senior staff, all of whom are on hand to offer help and advice when you need it.

That you will have access to a specific tax partner who will ensure that you and your business pay the minimum amount of tax possible including corporation tax, income tax, capital gains tax, national insurance, VAT and stamp duty.

To provide on-going technical advice and training on a host of business related matters provided by e-mail, one to one meetings and monthly business seminars.

# The Barnes Roffe Service Model

## You - our client

Your success is the primary motivator for all our partners. This means that we concentrate on your immediate requirements without ever losing sight of opportunities that might interest you in the future.

### **Your Company Strategic planning and compliance services**

Every company needs a plan for the short, medium and long term. We are not only interested in your business as it stands today but are always looking to work with you to ensure that you capitalise on any business opportunities as they arise in the future.

We pay particular attention to your specific corporate growth and development plans, making sure that we advise you and assist you in achieving your goals in every way possible.

### **You and Your Family Wills and inheritance tax planning**

In order to ensure that your assets and wealth are passed on to your immediate family and future generations it is important that you have a properly drafted will and that you minimize inheritance tax liabilities.

We arrange regular “will clinics” using partners from local solicitor firms to draft your will, mitigate your inheritance tax liabilities and where appropriate set up trusts and even convey property on your behalf.

By maintaining close contact with you we are able to take this positive approach. And because we know all our clients well, we can make suggestions which are relevant to your circumstances and aspirations.

### **Pensions Savings & Investments Annual performance review**

Pension payments are a very good way of sheltering company profits and corporation tax and should be used as a part of your overall tax planning strategy.

The performance of your pensions and savings should not just be left to chance. We recommend that every year you ensure that they are performing in line with current market conditions. By undertaking an annual review we can look at their performance and decide if fund changes are necessary and whether the level of your pension funding will produce your desired income in retirement.

### **Future Plans Setting targets and achieving goals**

We believe that your personal and business plans should be considered hand in hand. One cannot be achieved effectively without attention to the other. We believe that your plans for your future retirement alongside the continued prosperity of your family should be given serious consideration at the same time as planning your company's future.

# Testimonials



“ Barnes Roffe LLP have been our accountants for four years now. The best thing about them for us is that we have direct access to a partner who genuinely understands our business and is available virtually 24 hours a day to offer help and advice. ”

**Dr Richard Thomas**  
Managing Director  
NBA Tectonics Limited

“ Unlike other accountants Barnes Roffe seem to take a genuine interest in their clients. They offer many additional services free of charge such as their e-mail Topical Tips and regular seminars which offer real help to my business and my team. ”

**Les Beaumont**  
Managing Director  
QX Services Limited

“ Barnes Roffe have been our accountants and auditors for several years now looking after the payroll, accountancy and taxation side of my company. They are a very professional and friendly team who have provided me with excellent advice over the years and are always on-hand and ready to help out. ”

**Colin Pearce**  
Managing Director  
Active Silicon Limited

# Barnes Roffe Seminar Venue

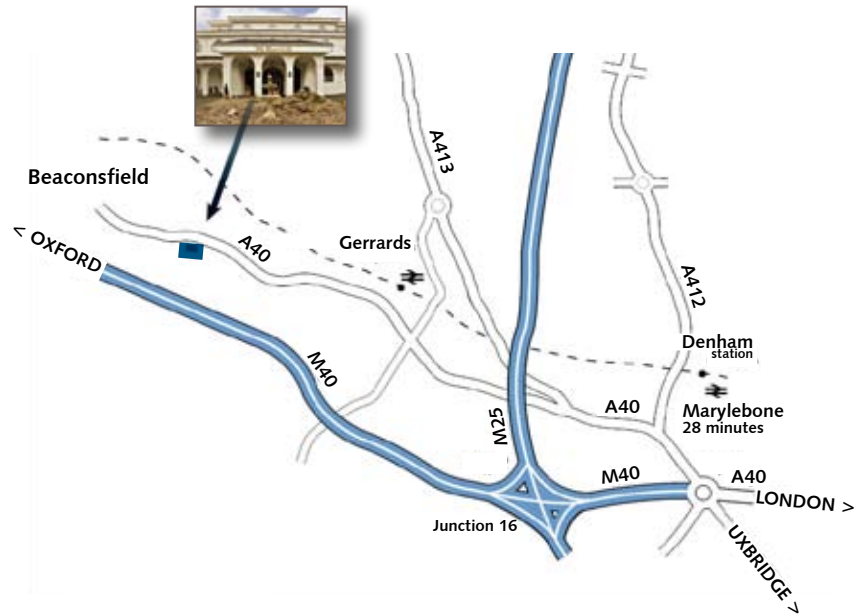
**Venue: The Bellhouse Hotel,**  
Oxford Road, Beaconsfield,  
Bucks, HP9 2XE  
Tel: 01753 893891

## By Road - M4

Exit junction 6, follow signs to Slough Central A355. At the edge of Slough, proceed straight on from traffic signals signposted Beaconsfield. At Beaconsfield roundabout (junction A40/A355) follow signs to Gerrards Cross A40. The Bellhouse is situated on the right approximately 1 mile from the roundabout.

## By Road - M25

Leave the M25 at junction 16, join the M40. Exit junction 2, follow signs to Beaconsfield A355. At the roundabout, take 2nd exit signposted A40 to Gerrards Cross. The Bellhouse is situated on the right,





**BARNES ROFFE LLP**  
CHARTERED ACCOUNTANTS

## Experience. The difference.

Barnes Roffe is an independent firm of chartered accountants and business advisors. We have provided audit and assurance, consulting, financial advisory, risk management and tax services to owner-managers for more than 100 years.

We are one of the UK's top 50 accountancy firms with 17 partners and over 150 employees all committed to delivering outstanding service to our clients.

Having helped clients weather the turbulent times of the last century, we pride ourselves on being able to offer practical advice along with a fresh perspective to our clients of today.

With four offices throughout the South East of England, we are a local firm with a national reputation.

[www.barnesroffe.com](http://www.barnesroffe.com)

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