Free Seminars and Presentations

2015

BARNES ROFFE LLP
CHARTERED ACCOUNTANTS

Clever Accountants for Business

Introduction

It looks like the economy has turned a corner with 2014 being a predominately successful year for many UK businesses and certainly for many of our clients. 2015 may mean uncertain times with a general election due and the EU suffering lack of growth.

Our series of free seminars in 2015 is designed to give practical help and advice to our clients and local businesses. They will all be held at the Buckinghamshire Golf Club.

Please feel free to attend as many of the seminars as you wish and to bring along business associates, colleagues or family!

We look forward to seeing you.

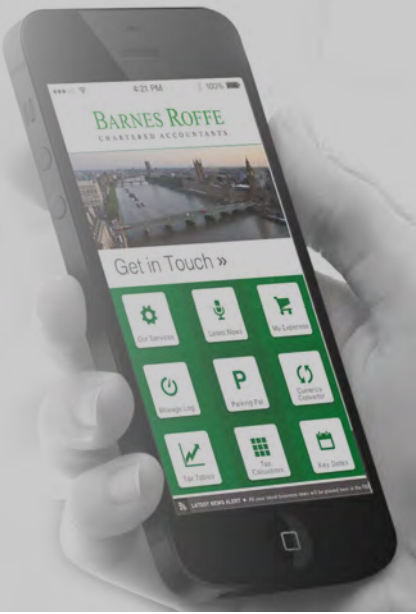
Michael Parkinson BSC ACA
Managing Partner, Uxbridge Office

2015 Year at a Glance

JAN	TOPICAL PENSION UPDATE	Mike Tattum	22/01/15	pm
FEB	HOW TO VALUE PRIVATE COMPANY SHARES	Stephen Corner	26/02/15	pm
MAR	THE BUDGET 2015 - A BREAKFAST SEMINAR	Stephen Corner	19/03/15	am
APR	FORMS P11D - DANGERS AND PITFALLS	Tony Lundberg	23/04/15	pm
MAY	PROPERTY AND TAX PLANNING	Stephen Corner	14/05/15	pm
JUN	PRACTICAL BALANCE SHEET FINANCE	Stephen Corner & Keith Stroud	18/06/15	pm
SEP	UNDERSTANDING YOUR FINANCIAL STATEMENTS	Sheryl Davis	17/09/15	pm
OCT	THE RIGHT PERSON FOR THE RIGHT JOB?	Mark Brooks	15/10/15	pm
NOV	YEAR END TAX PLANNING	Stephen Corner	19/11/15	pm
	FROM BOOKKEEPING TO MANAGEMENT ACCOUNTS	The Barnes Roffe Audit Managers	June & October	

Introducing

The New Barnes Roffe App



Available on iOS and Android, our new App has lots of great new features which we think you will find of real practical use.

- Expenses log
- Mileage Calculator
- Parking Pal
- Currency Convertor
- Current UK Tax Tables
- Tax Calculators
- Reminders Section
- Latest News

A week does not seem to pass without another announcement on pensions.

In the budget, Mr. Osborne introduced increased flexibility of benefits.

In the Tory party conference Mr. Osborne talked about tax free death benefits.

More recently there has been talk of multiple tax free lump sum payments.

April 2015 represents a pivotal moment, with all of these changes being introduced at the same time. Pensions have always offered tax benefits at the contribution stage, the new rules now offer tax planning opportunities from age 55 onwards.

Mike Tattum of Professional Assured Financial Services will draw together the various announcements and explain what this good news could mean for you.

Date	Thursday 22nd January 2015
Time	4.00pm-5.30pm
Presenter	Mike Tattum Professional Assured Financial Services
Cost	Free of Charge

JANUARY

TOPICAL PENSION UPDATE

PENSION CHANGES - FAST FORWARD TO FREEDOM!

Date	Thursday 26th February 2015
Time	4.00pm-5.30pm
Presenter	Stephen Corner Barnes Roffe LLP Tax Partner
Cost	Free of Charge

Most people want to know what their business is really worth, alas very few actually do!

Valuing shares in a private company is often a very complex and sometimes controversial exercise which can lead to serious disputes! Barnes Roffe Tax Partner Stephen Corner will be giving a presentation covering both the theory and the practise of valuing shares in privately owned businesses.

This will be a practical seminar with lots of worked examples.

HOW TO VALUE PRIVATE COMPANY SHARES

FEBRUARY

MARCH
BUDGET BREAKFAST 2015

Date	Thursday 19th March 2015
Time	8.30am-10.00am
Presenter	Stephen Corner Barnes Roffe LLP Tax Partner
Cost	Free of Charge

What impact will the 2015 Budget have on you and your business?

Barnes Roffe Tax Partner Stephen Corner will be giving this popular one hour presentation on the morning following the 2015 budget and we are pleased to offer guests a full English breakfast as well!

Many HM Revenue and Customs investigations are started because of errors included on or omissions made from forms P11D.

This presentation by Tony Lundberg will give guests a guide to completing forms P11D and set out exactly what information is required. He will also talk about "Dispensation" which is a way to avoid a large amount of P11D compliance work. He will also give an update on the proposed major changes to the whole system of benefit and expenses reporting.

Date	Thursday 23rd April 2015
Time	4.00pm-5.30pm
Presenter	Tony Lundberg Barnes Roffe LLP
Cost	Free of Charge

FORMS P11D - DANGERS AND PITFALLS!

APRIL

MAY

PROPERTY AND TAX PLANNING

Date	Thursday 14th May 2015
Time	4.00pm-5.30pm
Presenter	Stephen Corner Barnes Roffe LLP Tax Partner
Cost	Free of Charge

Many people believe that investment in property is the best thing going but there are many pitfalls and dangers along the way when trying to build up a valuable portfolio!

Barnes Roffe Tax Partner Stephen Corner will outline some useful tips to ensure you maximise your property related returns.

Date	Thursday 18th June 2015
Time	4.00pm-5.30pm
Presenter	Keith Stroud, HSBC Director, and Stephen Corner, Barnes Roffe LLP Tax Partner
Cost	Free of Charge

PRACTICAL BALANCE SHEET FINANCE

RAISING FINANCE BY UTILISING YOUR BUSINESS ASSETS

Even successful businesses sometimes struggle to get finance to fund growth.

There are an array of funding sources potentially available to businesses including secured bank loans, cash flow loans perhaps backed by a government scheme, leasing, factoring, invoice discounting and there is now crowd funding which is a fast developing player in the market. There are also a number of new funding providers in the market place looking for business.

HSBC Director Keith Stroud and Barnes Roffe Tax Partner Stephen Corner will discuss the options available to businesses and how you can present your case. Alternative finance sources will also be explained.

JUNE

UNDERSTANDING YOUR FINANCIAL STATEMENTS

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 the 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.

Uxbridge office partner Sheryl Davis will give guests practical help and enable them to better understand their statutory accounts.

SEPTEMBER

Date	Thursday 17th September 2015
Time	4.00pm-5.30pm
Presenter	Sheryl Davis Barnes Roffe LLP Partner
Cost	Free of Charge

Anyone involved in the recruitment of staff will know that mistakes can be costly. There are many people in the job market and it can be difficult to narrow down the field to ensure that you get the right candidates for the jobs that you are offering.

You may well be aware of the use of "psychometric profiling" as a tool for successful recruitment. In this seminar our guest speaker from Thomas International will show you how to maximise its effectiveness in the recruitment process.

Date	Thursday 15th October 2015
Time	4.00pm-5.30pm
Presenter	Mark Brooks Thomas International
Cost	Free of Charge

HAVE YOU PICKED THE RIGHT PERSON FOR THE RIGHT JOB?

OCTOBER

YEAR END TAX PLANNING

NOVEMBER

Date	Thursday 19th November 2015
Time	4.00pm-5.30pm
Presenter	Stephen Corner Barnes Roffe LLP Tax Partner
Cost	Free of Charge

We all pay taxes in one form or another on a regular basis be it Income Tax, Capital Gains Tax, Corporation Tax, VAT, National Insurance or even Stamp Duty!

This seminar run by Barnes Roffe Tax Partner Stephen Corner will look at the ways to minimise taxation through simple planning devices and some more complex arrangements. After all why pay tax at 45% when often there is no need! Stephen will give some practical advice on how to save tax in whatever form you pay it!

From Bookkeeping to Management Accounts

Mark Hancock

Ranmalee Ariyasena

In 2015 we will be running two training courses at the Uxbridge office designed specifically for our clients' accounting staff.

These will be led by audit managers Ranmalee Ariyasena and Mark Hancock. Each will last for about two hours in three separate sessions.

They will demonstrate some straight-foward 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.

For the complete course we will charge a nominal fee of £50 per head.

THE CURE FINANCIAL

TO YOUR HEADACHES

These courses are aimed at people who already have a reasonable knowledge of bookkeeping which they are keen to improve. They will be run in June and October on the dates shown here:-

Cost; £50 per person.

June 2015

Date: Thursday 11th
Time: 2 pm – 4.30 pm

Date: Thursday 18th
Time: 2 pm – 4.30 pm

Date: Thursday 25th
Time: 2 pm – 4.30 pm

October 2015

Date: Thursday 8th
Time: 2 pm – 4.30 pm

Date: Thursday 15th
Time: 2 pm – 4.30 pm

Date: Thursday 22rd
Time: 2 pm – 4.30 pm

We believe you require

- 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

- 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 regular business seminars.

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 most 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

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

Partner

Stephen Corner LLB (Hons), FCA, Barrister

Stephen is one of our five specialist tax partners. Having qualified as a barrister he then qualified as a Chartered Accountant.

With nearly 30 years experience of providing advisory services in tax and transactions Stephen heads up the firm's transactions specialism. With client experience as varied as a £1bn property fund, he has assisted in setting up a knitwear factory in Glasgow, a marina in Devon and having been a director of a quoted company in the entertainment sector he has a wide and varied track record behind him.

With a recognised ability to cut through and simplify complex issues Stephen is adept at creating innovative tailored solutions to client problems helping clients create opportunity through planning.

Telephone direct dial: 01895 276780
E-mail: s.corner@barnesroffe.com

Partner

Chris Smith BA ACA

Chris has nearly 20 years experience advising a diverse range of clients on a wide variety of business related issues, developing strong collaborative relationships while providing commercial insights and practical advice.

With a keen focus on owner managed and entrepreneurial businesses, his client experience has ranged from advising start ups through to listed entities.

Chris has an in depth knowledge of the Media, Property, Professional Services, Technology and Consumer Product sectors, bringing considerable market expertise and innovative solutions.

He is committed to ensuring that strategic objectives are given the same attention as the daily operational demands of his clients.

Telephone direct dial: 01895 276796
E-mail: c.smith@barnesroffe.com

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.

Client Testimonials

"At Barnes Roffe, I have a bespoke team of professional and friendly people that look after my company and my personal tax affairs. I know that whenever I need help someone is at the end of the phone who will bend over backwards to help me with my problem."

Paul Griffin
MD Unitrust Protection Services (UK) Ltd

"Several years ago we changed our accountants to Barnes Roffe following the advice of friends and colleagues.
We haven't been disappointed!
As well as expert advice through our key contact Sheryl Davis, we enjoy the free seminars provided as these keep us updated on a variety of relevant topics throughout the year.
I am pleased to recommend Barnes Roffe."

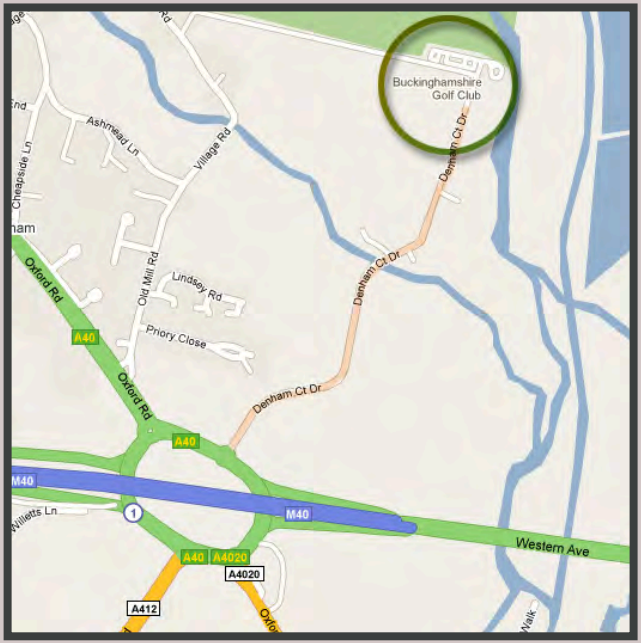
Colin Irving
Managing Director, GCL Logistics

Barnes Roffe Seminar Venue

Venue: The Buckinghamshre Golf Club
Denham Court Drive, Denham,
Buckinghamshire, UB9 5PG
Tel: 01895 835777

From the M25 Junction 16
Please take the M40 in the direction of London. Leave the M40 at the next junction (J1).
At the bottom of the slip road, turn left at the traffic lights. Turn immediately right at the mini round-about and immediately left at the next mini-roundabout. This brings you to Denham Court Drive (also signed Denham Country Park). Buckinghamshire Golf Club is at the top of Denham Court Drive. Drive up to the black wrought iron gates slowly and they will open automatically.

From London on the A40
Where the A40 becomes the M40 leave it at Junction1 (signposted to Gerrards Cross) At the bottom of the slip road, turn right at the traffic lights and right again at the mini roundabout. This brings you to Denham Court Drive (also signed Denham Country Park). Buckinghamshire Golf Club is at the top of Denham Court Drive. Drive up to the black wrought iron gates slowly and they will open automatically.



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 110 years.

We are one of the UK's top 50 accountancy firms with 17 partners and over 120 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.

Clever Accountants for Business

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