Free Seminars and Presentations 2016

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BARNES ROFFE LLP
CHARTERED ACCOUNTANTS

Clever Accountants for Business

Introduction

The economy has seen an upturn in 2015 with many UK businesses having a more successful year. Hopefully this will continue through 2016 albeit with some uncertainty already showing through worldwide markets and talk of possible interest rate rises.

Our series of free seminars in 2016 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

2016 Year at a Glance

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JAN	THE SIMPLE WORLD OF PENSIONS	Mike Tattum	21/01/16	pm
FEB	WILLS, INHERITANCE TAX AND PROBATE	Stephen Corner	25/02/16	pm
MAR	THE BUDGET 2016 - A BREAKFAST SEMINAR	Stephen Corner	17/03/16	am
APR	FORMS P11D - DANGERS AND PITFALLS	Tony Lundberg	21/04/16	pm
MAY	KNOWING YOUR NUMBERS - PART 1	Chris Smith	19/05/16	pm
JUN	KNOWING YOUR NUMBERS - PART 2	Sheryl Davis	23/06/16	pm
SEP	WEALTH MANAGEMENT	Stephen Corner	22/09/16	pm
OCT	UNDERSTANDING YOUR FINANCIAL STATEMENTS	Sheryl Davis	20/10/16	pm
NOV	YEAR END TAX PLANNING	Stephen Corner	17/11/16	pm

Pensions are about to get a whole lot more complicated!

There have been some sweeping changes to the way we pay in and cash out our pensions. Some of the changes offer super opportunities, some need advanced planning and careful consideration.

Mike Tattum managing director of Professional Assured Financial Services Limited will help navigate us through the 2016 pension landscape.

Date	Thursday 21st January 2016
Time	4.00pm-5.30pm
Presenter	Mike Tattum Professional Assured Financial Services
Cost	Free of Charge

JANUARY

THE SIMPLE WORLD OF PENSIONS

Stephen Corner will take a focused look at the often difficult world of wills and probate.

Barnes Roffe LLP are licensed to carry out probate work and as well as examining and unravelling the mysteries of probate will look at properly structuring wills and will drafting.

Stephen will also look at deeds of variation and contentious probate situations as well as providing inheritance tax planning ideas and tips.

FEBRUARY

WILLS, INHERITANCE TAX AND PROBATE

Date	Thursday 25th February 2016
Time	4.00pm-5.30pm
Presenter	Stephen Corner Uxbridge Office Tax Partner
Cost	Free of Charge

MARCH
BUDGET BREAKFAST 2016

Date	Thursday 17th March 2016
Time	8.30am-10.00am
Presenter	Stephen Corner Uxbridge Office Tax Partner
Cost	Free of Charge

What impact will the 2016 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 2016 budget and we are pleased to offer guests a full English breakfast as well!

There are tough penalties imposed by HM Revenue and Customs for failing to meet submission deadlines for forms P11D as well as stringent penalties if incorrect forms are submitted.

Uxbridge office Manager Tony Lundberg will give detailed advice on how to complete the forms and exactly what they should include.

Tony will also briefly outline some major changes to the reporting of and the taxation of expenses and benefits which come into force on 6th April 2016 including the abolition of the "dispensation" arrangements with HMRC

FORMS P11D - DANGERS AND PITFALLS!

APRIL

Date	Thursday 21st April 2016
Time	4.00pm-5.30pm
Presenter	Tony Lundberg Uxbridge Office Manager
Cost	Free of Charge

MAY

KNOWING YOUR NUMBERS!

PART 1 CASH IS KING

Date	Thursday 19th May 2016
Time	4.00pm-5.30pm
Presenter	Chris Smith Uxbridge Office Partner
Cost	Free of Charge

Many business owners concentrate on making profit but do they really understand how their business generates cash?

This seminar will highlight the vital importance of understanding your cash cycle and give simple techniques that you can use to improve your cash flow and to ensure you have sufficient working capital!

Uxbridge office partner Chris Smith will also explain how to prepare cash flow forecasts and provide tools to manage and monitor your cash flow. These will improve your awareness of the day to day state of your business and help avoid any unforeseen problems

Chris will provide a step by step guide to helping you keep your cash.

JUNE

KNOWING YOUR NUMBERS!

PART 2 THE IMPORTANCE OF UP TO DATE MANAGEMENT INFORMATION

Date	Thursday 23rd June 2016
Time	4.00pm-5.30pm
Presenter	Sheryl Davis Uxbridge Office Partner
Cost	Free of Charge

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

Barnes Roffe Uxbridge office partner Sheryl Davis will go through the principles of preparing a budget and then go on to show how to forecast 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.

WEALTH MANAGMENT

You spend many years of your life and a great deal of hard work in building your business in order to create wealth - but do you know how to look after it?

Stephen Corner, chairman of the ICAEW committee set up to review and promote wealth management activity in the profession, will look at wealth management as a whole of life planning tool for clients.

Date	Thursday 22nd September 2016
Time	4.00pm-5.30pm
Presenter	Stephen Corner Uxbridge Office Tax Partner
Cost	Free of Charge

SEPTEMBER

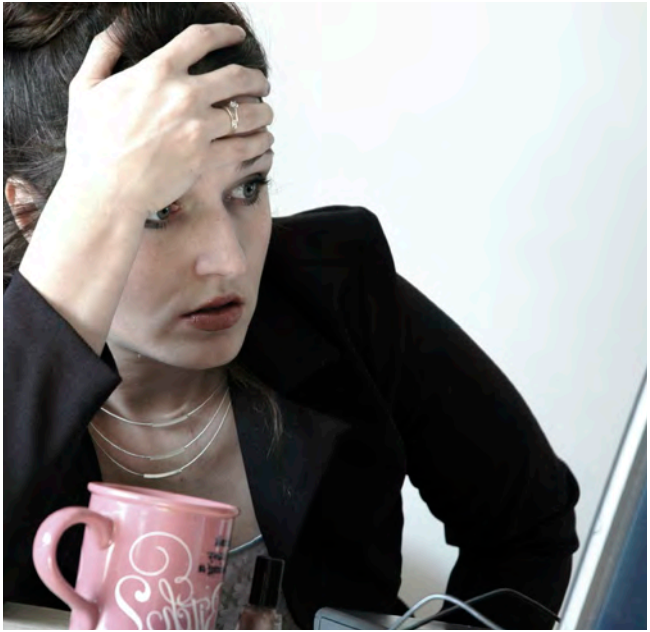
Surprisingly, experts have predicted that up to 60% of Company Directors are unable to properly read a set of accounts! Many don't realise that the balance sheet is probably far more informative about the state of the company's affairs than the profit and loss account.

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.



UNDERSTANDING YOUR FINANCIAL STATEMENTS

OCTOBER

Date	Thursday 20th October 2016
Time	4.00pm-5.30pm
Presenter	Sheryl Davis Uxbridge Office Partner
Cost	Free of Charge

YEAR END TAX PLANNING

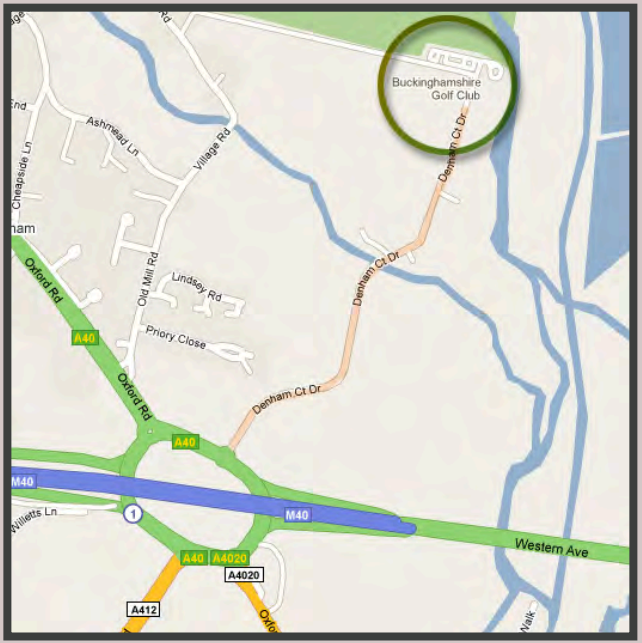
Date	Thursday 17th November 2016
Time	4.00pm-5.30pm
Presenter	Stephen Corner Barnes Roffe LLP Tax Partner
Cost	Free of Charge

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 Uxbridge Office 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!

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 (Junction 1).
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 Junction 1 (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.

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.

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

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.

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. He has varied client experience such as setting up a £1bn property fund, assisting 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

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 115 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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