



Training Programme

2024

mercia-group.com

Welcome to Mercia's 2024 Training Programme

Mercia's extensive programme of technical and professional skills training is offered in a variety of formats, supporting members of all accounting and tax associations and institutes in meeting their CPD requirements.

New this year for our members is the Mercia Learning Hub with a vast array of great features. These include setting and benchmarking professional goals via the CPD tracking tool as well as personalising content and insights relevant to each individual.

Our client insights identified a skills gap for accounting and tax professionals who have recently qualified and are progressing to manager level. For 2024, we have created a new pathway, which includes both the technical and professional skills required to be successful. Other exciting developments in our CPD programme include the expansion of our Back to Basics courses, which now include audit; a regulatory concerns series; and other bite sized offerings throughout the entire programme.

Whatever you or your team's training needs are in 2024, Mercia is here to support you.

All prices in this brochure exclude VAT



Membership

Pay a monthly fee per person based on your membership



Pay as You Go

Pay per person per course



In-House Training

Courses delivered exclusively to your team



Bespoke Packages

Build your own training solution

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**Use our
interactive
links**

Click on the course titles throughout this brochure.

Training Membership Options

Enjoy access to hundreds of courses for an annual fee payable monthly by direct debit.

£41

per person per month

CPD Digital membership Early Careers Digital membership

Access to all digital CPD courses and for early careers access to all courses in the pathway

£43.50

per person per month

CPD Digital PLUS

Access to all digital CPD courses PLUS all management and leadership online courses

£45*

per person per month

Face-to-Face CPD

Access to all face-to-face CPD and digital CPD courses

*Digital Management and Leadership courses can be added to a face-to-face membership for an additional £2.50 per person per month.

All prices in this brochure exclude VAT

Included in all membership options:

- ✓ Unlimited access to all course titles in your membership
- ✓ Complete Regulatory Training Series
- ✓ Mental Health, Wellbeing and Resilience Series
- ✓ Bite sized learning modules
- ✓ Exclusive members' events: Ask the Expert and Insights from Experts
- ✓ Vision quarterly technical update
- ✓ Discounts on Mercia products and services.

What's New



Verifiable CPD pathways

For members of the ICAEW we recognise that the new ICAEW rules are a lot to consider and to make it easier for you we have bundled our courses together into suggested pathways to help you meet your verifiable CPD hours. Our pathways are based on your CPD Category per the ICAEW regulations and your technical stream.

We also support all professional bodies

See pages 18-21 for details.



Festival of CPD

Meet your CPD requirements at our live streamed three-day festival of training. With a day each devoted to audit, financial reporting and tax you can choose which days are relevant to you.

See page 50 for details.



CPD Back to Basics for Audit

Building on our successful Back to Basics CPD programme launched for tax, we have a number of refresher modules for those working in audit.

See page 26-27 for details.



Audit and Accounting Regulatory Concerns Series

We have a new series of short (1 hour) live streamed modules focusing on topical issues of concern for the regulators.

See page 32 for details.



CPD Digital PLUS membership

Professional skills have always been important to accountants and tax advisors but increasingly there is more focus on these essential skills. Our CPD Digital PLUS membership gives you and your team access to our broad range of Skills, Management and Leadership courses as part of the membership. These courses can also be used towards verifiable CPD hours.

See pages 52-53 for details of the Skills, Management and Leadership programme.



Progression to Management pathways

Recognising those who have recently qualified may need additional support, we have created pathways per technical stream for individuals moving towards or who are new to management.

See pages 14-15 for details.



Enhanced Early Careers pathways

We have enhanced our pathways adding additional content across all streams of the programme.

See pages 8-9 for details.

Regulatory Training Series for all the Team

Our online regulatory training series provides firm-wide access to a collection of interactive eLearning modules which are perfect for training new starters and for helping to keep your team's knowledge up to date.

The series includes modules covering:

- ✓ Introduction to Money Laundering
- ✓ Introduction to the Bribery Act
- ✓ Introduction to the Criminal Finances Act
- ✓ Introduction to GDPR
- ✓ Introduction to PCRT
- ✓ Introduction to Professional Ethics
- ✓ AML, Bribery Act and CFA Key Points and Refresher

[Click here to view details online.](#)



Mental Health, Wellbeing and Resilience Series

Aimed at trainees and useful as a refresher for more experienced members of staff, this pack covers a range of topics to promote positive wellbeing and resilience through real-life stories, checklists and other resources.

The series includes modules covering:

- ✓ Maintaining Your Mental Health
- ✓ Working under Pressure
- ✓ Helpful and Unhelpful Thinking
- ✓ Understanding Different Personalities
- ✓ Managing your Wellbeing
- ✓ Taking Responsibility

[Click here to view details online.](#)



Regulatory Training Series Pricing

Included in membership

Number of partners	*Price
1	£130
2 to 4	£405
5 to 9	£655
10 to 19	£1,035
20+	POA

* Price for 12 months' access for the whole firm.

Mental Health, Wellbeing and Resilience Series Pricing

Included in membership

Number of partners	*Price
1	£105
2 to 4	£315
5 to 9	£525
10 to 19	£840
20+	POA

* Price for 12 months' access for the whole firm.

☎ For more details and to purchase, call **0330 058 7141**.

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Early Careers

Create Your Own Pathways

We know that one size does not fit all and with a wide range of workshops you have the flexibility to create a tailored and blended learning programme for each member of your team.

Our on-demand and interactive eLearning modules are designed to be completed at the most appropriate time for your trainee's role and experience, recognising that not everyone requires training at the same time.

Our interactive, live streamed sessions are led by expert tutors who will support the trainees with further examples and provide opportunities for questions.

All courses are practical, giving your trainees the skills to be effective in their role and to provide continuous development opportunities. The timings are suggested only. Your trainees can complete the modules at any time in the training contract.

KEY	On-Demand	Tutor-Led Live Streamed	Available as both Tutor-Led Live Streamed and On-Demand
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Click on the course titles to view details online 

All Early Careers courses can be booked as pay as you go or, are included in Early Careers membership, **see page 2 for details.**

	Accounting	Auditing	Tax	Professional Skills
	<ul style="list-style-type: none"> Regulatory Training Series Bookkeeping: The First Principles Bookkeeping: The Next Stage Bookkeeping Case Study Introduction to VAT Preparing and Finalising Accounts new Introduction to Accounting for Different Taxes 	<ul style="list-style-type: none"> Regulatory Training Series new Auditing Skills Series Year 1 - New modules added Introduction to Audit and How to Audit Case Study 	<ul style="list-style-type: none"> Regulatory Training Series Introduction to VAT Introduction to PAYE Taxation of Individuals Introduction to CGT Calculating Trade Profit Capital Allowances - The Basics Unincorporated Tax Case Study 	<ul style="list-style-type: none"> Professional Skills - Making the Right Start with Colleagues and Clients Communicating Effectively Time Management Professional Skills for Trainees - Year 1 Mental Health, Wellbeing & Resilience Series
	<ul style="list-style-type: none"> Understanding Company Accounts Preparing Accounts: More Complex Issues Accounts Finalisation and Interviewing Skills 	<ul style="list-style-type: none"> new Auditing Skills Series Year 2 - New modules added How to Audit More Complex Areas Case Study 	<ul style="list-style-type: none"> Corporation Tax Issues Capital Allowances - The Next Stage Employment Benefits and P11Ds VAT Issues for Trainees Incorporated Business Tax Case Study 	<ul style="list-style-type: none"> Professional Skills for Trainees - Year 2 Writing Skills new Making Decisions and Prioritising Mental Health, Wellbeing & Resilience Series
	<ul style="list-style-type: none"> Introduction to Deferred Tax Accounting Refresher and Update for Trainees new Practical Accounting for Trainees 	<ul style="list-style-type: none"> new Auditing Skills Series Year 3 - New modules added Audit Refresher and Update for Trainees new Becoming an Audit In-Charge 	<ul style="list-style-type: none"> General Tax Update for Trainees new Introduction to Inheritance Tax Introduction to Trusts International Aspects of Personal Tax 	<ul style="list-style-type: none"> Presentation Skills Delivering an Effective Appraisal Professional Skills for Trainees - Year 3 Mental Health, Wellbeing & Resilience Series

Early Careers Pathways



Auditing Skills Series

With audit regulation becoming more complex and with the continuous focus by the regulators on audit quality, our interactive and on-demand eLearning gives your trainees the knowledge and skills they need to be effective on your audits and to enhance audit quality.

Focusing on the underlying requirements of the auditing standards, the programme takes trainees on a learning journey from introducing the basic concepts of auditing, such as materiality and risk, through to how to audit complex balances such as provisions. Professional scepticism and the need for documentation are themes which run through all years.

As part of the learning, trainees will perform audit testing in a case study environment, using source documents and completing testing as they would on a real audit. The structure of the courses offers flexibility and opportunities for just-in-time learning where trainees can complete a short module before undertaking tasks on the audit, enabling them to put the learning into practice right away.

Examples of modules included

Year 1	Year 2	Year 3
Introduction to audit	Materiality	Audit of groups
Key concepts: planning and risk assessment	Going Concern	Audit reports
Key concepts: risk response and evidence	Understanding internal controls	How to audit provisions
How to audit bank/cash	How to audit journals	Use of experts on an audit
How to audit inventory	How to audit tax	Audit of accounting estimates
How to audit payroll	How to audit intangibles	

[Click here](#) for more information.

Price £500 per trainee per year.



Accounting

As accounting forms the foundation across all disciplines, we have a range of courses to support trainees in this area. Our bookkeeping courses are available as on-demand eLearning and as live streamed. They are supported by a tutor-led case study to help trainees put the learning into practice.



Tax

Whatever route your trainees take, you can pick and choose from our selection of tax courses to complement their study or work in the office. We also have tutor-led live streamed workshops to lead them through practical case studies and reinforce their knowledge.



Professional Skills

Although technical skills are essential, personal skills play an important part in creating a rounded and effective professional. We have a series of courses for trainees to attend as their career progresses.

All Early Careers courses are included in Early Careers membership, [see page 2 for details](#).

Price £79 per trainee per title.

Early Careers

Tutor-Led Live Streamed

COURSE	PRICE	DURATION	TUTOR LED LIVE STREAMED DATES							
ACCOUNTING										
Bookkeeping - The First Principles	£158	1 day	08 Jan	19 Feb	02 Sep	09 Sep	16 Sep	23 Sep	-	-
Bookkeeping - The Next Stage	£158	1 day	09 Jan	20 Feb	03 Sep	10 Sep	17 Sep	24 Sep	-	-
Bookkeeping Case Study	£316	2 days	10-11 Jan	21-22 Feb	04-05 Sep	11-12 Sep	18-19 Sep	25-26 Sep	09-10 Oct	-
Preparing and Finalising Accounts	£158	1 day	07 Mar	08 Oct	05 Nov	-	-	-	-	-
Accounts Finalisation and Interviewing Skills	£158	1 day	20 May	25 Jun	07 Nov	05 Dec	-	-	-	-
Practical Accounting for Trainees	£316	2 days	20-21 Mar	08-09 May	17-18 Oct	11-12 Nov	-	-	-	-
AUDITING										
Introduction to Audit and How to Audit Case Study	£474	3 days	29-31 Jan	10-12 Jun	24-26 Jun	18-20 Nov	02-04 Dec	-	-	-
How to Audit More Complex Areas Case Study	£316	2 days	13-14 Mar	22-23 May	21-22 Oct	20-21 Nov	-	-	-	-
Becoming an Audit In-Charge	£158	1 day	14 May	02 Jul	24 Oct	07 Nov	-	-	-	-
TAX										
Unincorporated Tax Case Study	£79	0.5 days	15 May (am)	05 Jun (am)	07 Nov (am)	11 Dec (am)	-	-	-	-
Incorporated Business Tax Case Study	£79	0.5 days	09 May (am)	04 Jun (am)	12 Nov (am)	05 Dec (am)	-	-	-	-
General Tax Update for Trainees	£158	1 day	11 Jun	-	-	-	-	-	-	-
PROFESSIONAL SKILLS										
Making the Right Start with Colleagues and Clients	£79	0.5 day	12 Jan (am)	23 Feb (am)	06 Sep (am)	13 Sep (am)	20 Sep (am)	27 Sep (am)	-	-
Professional Skills for Trainees - Year 1	£158	1 day	03 Oct	22 Oct	07 Nov	26 Nov	-	-	-	-
Professional Skills for Trainees - Year 2	£158	1 day	11 Sep	18 Oct	06 Nov	05 Dec	-	-	-	-
Professional Skills for Trainees - Year 3	£158	1 day	22 May	11 Jun	09 Jul	13 Nov	-	-	-	-

Click on the course titles to view details online. 

All Early Careers tutor led courses are included in Early Careers membership, [see page 2 for details](#).

Progression to Management

Create Your Own Pathways

Our Manager Pathways are designed to support those progressing into the manager role, or who are newly promoted into the role, with the technical and professional skills needed to be successful.

Spanning approximately 18 months our professional skills courses in this pathway cover introductory management skills including delegation, coaching, client relationships, and leading a team. For more experienced staff we have a range of Management and Leadership courses available on **pages 52-53**.

Our blended approach of on-demand interactive eLearning and tutor-led sessions are designed to be completed at an appropriate time for your learner's role and experience, recognising that not everyone requires training at the same time.



KEY	On-Demand	Tutor-Led Live Streamed	Available as both Live Streamed and On-Demand
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Accounting



Auditing



Tax



Professional Skills

<p>Ethics Update and Refresher</p> <p>Introduction to Group Accounting Issues</p> <p>Introduction to Transactions Between Companies and Directors</p> <p>Efficient File Completion and Review</p>	<p>Ethics Update and Refresher</p> <p>Bridging the Gap - Audit Senior to Audit Manager</p> <p>Challenge of Management</p>	<p>Ethics Update and Refresher</p> <p>Introduction to Corporate Groups</p> <p>Introduction to Partnerships</p> <p>Introduction to Tax Governance</p> <p>Introduction to VAT Risk and Opportunities</p> <p>Practical General Tax Update</p>	<p>Module 1 - Stepping into Management</p> <p>Module 2 - You as a Manager</p> <p>Module 3 - Succeeding at Management</p>
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Click on the course titles to view details online.

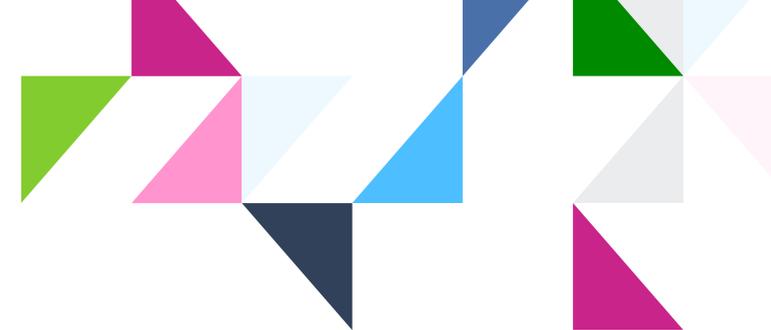
All courses in this pathway are included in CPD membership, **see page 2 for details**.

For more advanced Management and Leadership courses see our Skills, Management and Leadership programme on **pages 52-53**



Progression to Management

Tutor-Led Live Streamed



COURSE	PRICE	DURATION	LIVE STREAMED DATES	
ACCOUNTING				
Introduction to Group Accounting Issues	£79	0.5 days	13 Jun (am)	03 Dec (am)
Introduction to Transactions between Companies and Directors	£79	0.5 days	20 May (am)	22 Nov (am)
Efficient File Completion and Review	£79	0.5 days	13 May (am)	28 Nov (am)
AUDITING				
Bridging the Gap - Audit Senior to Audit Manager	£79	0.5 days	20 Jun (am)	10 Oct (am)
TAX				
Practical General Tax Update	£158	1 day	26 Jun	-
PROFESSIONAL SKILLS				
Module 1 - Stepping into Management	£158	1 day	26 Mar	04 Sep
Module 2 - You as a Manager	£158	1 day	08 May	02 Oct
Module 3 - Succeeding at Management	£158	1 day	25 Jun	25 Nov

[Click on the course titles to view details online.](#)

All Progressing and New to Manager courses are included in CPD membership, [see page 2 for details.](#)

Achieving your CPD Requirements with Mercia

At Mercia we are committed to helping you to achieve your CPD requirements through our training programme and resources. Using Mercia's innovative new **Learning Hub** you can set CPD targets and track progress towards your CPD goals. Our courses are verifiable and we can produce CPD records for submission to your relevant accounting or tax body and for any regulatory inspection.

At Mercia we can meet your CPD requirements through:

- ✓ CPD courses
- ✓ Mercia's Festival of CPD
- ✓ Exclusive Members events
- ✓ Regulatory training
- ✓ Management and Leadership courses
- ✓ Mercia Conference programme
- ✓ Mercia podcasts
- ✓ Mercia blogs.

Mercia's New Learning Hub

COMING SOON

The new Learning Hub will include many great features.

- ✓ Enhanced user experience on both desktop and mobile with easy access to hundreds of CPD courses and insights.
- ✓ Set professional goals via the CPD tracking tool.
- ✓ Content personalisation with recommendations – delivered via your selections and settings.
- ✓ Firms can mandate courses and hours required to individuals and team members.
- ✓ Ability to track and monitor completed training requirements.

Throughout 2024, you will see further enhancements to the Hub to support your own and your team's learning experience and tracking of your CPD requirements.

Suggested CPD Pathways

Based on the **ICAEW regulations** effective from 1 November 2023, we have suggested pathways to help you to complete your CPD requirements depending on your technical specialism.



These pathways are suggestions only and are completely flexible. Note that different professional bodies may have slightly different requirements. Please consult with your relevant institute or association about your requirements.

CATEGORY 3: 10 or more hours of verifiable CPD.
(Including 1 hour of Ethics training)

CATEGORY 2: 20 hours verifiable CPD: Category 3 requirements + 10 or more verifiable hours.

(Most ACCA members will fall into Category 2)

CATEGORY 1: 30 hours verifiable CPD: Category 2 requirements + 10 or more verifiable hours.

AUDIT
Ethics Update and Refresher (1 hour)
A&A Update - Spring (3 hours)
A&A Update Autumn (3 hours)
Tax Update for A&A (1 hour)
Audit Regulatory Feedback (1 hour)
Getting Started with ESG (1 hour)
Ethics for PIEs and Listed Entities (1 hour)
IFRS Update and Refresher (3 hours)
A&A Update for PIES and Large Entities (3 hours)
Group Audit Issues Including ISA 600 (3 hours)
Regulatory Concerns - (each 1 hour) <ul style="list-style-type: none"> Cashflow Statements Construction Contracts Provisions, Estimates and Judgements Revenue Recognition Taxation (Audit and Accounting) Money Laundering Update
Data Analytics - What Everyone Needs to Know (2 hours)
Sector specific training (up to 2 hours) e.g. Pensions, Charities, Properties

GENERAL PRACTICE - (NON-AUDIT)
Ethics Update and Refresher (1 hour)
Accounting Update and Topical Issues (3 hours)
Tax Update - Finance Act (3 hours)
Accounting and Compliance for OMBS (3 hours)
Ethics for PIEs and Listed Entities (1 hour)
IFRS Update and Refresher (3 hours)
Group Accounting Issues (3 hours)
Getting Started with ESG (1 hour)
Transactions Between a Company and its Directors (3 hours)
Regulatory Concerns - (each 1 hour) <ul style="list-style-type: none"> Cashflow Statements Construction Contracts Provisions, Estimates and Judgements Revenue Recognition Taxation (Audit and Accounting) Money Laundering Update
Sector specific training (up to 4 hours) e.g. Pensions, Properties, Charities, SRA, FCA, Probate, LLP, Narrative Reporting

TAX
Ethics Update and Refresher (1 hour)
Tax Update - Spring (3 hours)
Tax Update - Finance Act (3 hours)
Tax Update - Autumn (3 hours)
Budget Rapid Reaction (2 hours)
Corporate: <ul style="list-style-type: none"> Spring six-monthly update (2 hours) Autumn six-monthly update (2 hours) Company Tax Computations (3 hours) Minimum of 1 hour of relevant content
Owner Managed Businesses: <ul style="list-style-type: none"> Current Issues for OMBs (3 hours) Succession Planning for Family Business (3 hours) Personal and Employment Tax Update (3 hours)
Personal: <ul style="list-style-type: none"> Personal and Employment Tax Update (3 hours) Completing Tax Returns for Individuals (3 hours) Taxation of Couples (3 hours)
Training in your specialism (up to 10 hours) such as: <ul style="list-style-type: none"> High Net Wealth Client Trusts Property Share and Business Valuations Land Transaction Taxes Share Options

The categories are for those working in practice as there are different requirements for those who work outside of practice.

All courses are included in CPD membership, [see page 2 for details](#).

CPD Face-to-Face Locations and Courses

A programme of key updates is presented in over 30 locations across the UK.

These are an ideal opportunity to keep up to date in key areas, to network with your peers and meet the speaker.

+ East Anglia

Colchester
Ipswich

+ East Midlands

Leicester
Northampton
Nottingham

+ London

Central London
Elstree

+ North East

Darlington
Gomersal
Hull
Leeds
Sheffield
York

+ Northern Ireland

Templepatrick

+ North West

Haydock
Knutsford
Lancaster

+ South West

Bristol
Gloucester
Taunton

+ Southern Counties

Dorking
Brighton
Southend
Basildon

+ Staffs & Shropshire

Shrewsbury
Stafford

+ Thames Valley

High Wycombe
Wokingham

+ Wales

Cardiff

+ West Midlands

Birmingham
Coventry
Solihull
Walsall

Click on the locations to view details online. [Click Here](#) to see your venue pages.

Face-to-Face CPD Courses

Accounting and Auditing

- ✓ Accounting and Auditing Update and Refresher - Spring
- ✓ Accounting and Auditing Update and Refresher - Autumn

Taxation

- ✓ Tax Update - Spring
- ✓ Tax Update - Finance Act
- ✓ Tax Update - Autumn
- ✓ Tax Update - Current Issues for OMBs

Click on the course titles to view details online. [Click Here](#)



All courses are included in CPD Face-to-Face membership, [see page 2 for details](#).

Your CPD Programmes

Live Streamed and On-Demand

Mercia live streamed and on-demand courses offer you and your team the flexibility to learn at a time and in a place that works best. With over 200 course titles Mercia provides the breadth of training needed for your entire practice. Choose from a range of course lengths and start times.

Live Streamed

Live streamed courses are delivered by our expert trainers via Zoom allowing learners to ask questions and interact with the expert and with other delegates. Detailed course notes are provided, and the session is recorded so that it can be revisited.

On-Demand and Back Catalogue

Recordings of our live streamed courses are available to buy on-demand with access for 12 months from the release date. The recording is broken down into chapters allowing you to focus on the topics most relevant to your learning.

We also have an extensive back catalogue of on-demand recordings included in our CPD memberships or available to buy on an individual basis. [Click here](#) to see our full list.

Digital Accessibility

We are committed to digital accessibility and all of our on-demand recordings are closed captioned. We also provide audio files with our recorded courses so that they can be downloaded to your MP3 device to listen to at your convenience.

CPD Bite Sized

We know your time is precious and that you may want to dip into a topic between meetings or at the start or end of your day.

Mercia bite sized learning takes topical issues from past and recent courses and packages these so that you can consume shorter courses with more flexibility. Each module will range from 5 to 30 minutes in length, with a fixed price of £25 per person per module. The programme will develop throughout the year in reaction to what is topical. We will also announce new releases in monthly newsletters.

Some examples from our bite sized offering includes:

- ✓ Tax Relief on Amortisation of Goodwill
- ✓ Key issues on PPR
- ✓ Research and Development - What is it
- ✓ Financial Instruments - forward exchange contracts
- ✓ ISA 315 - Key Changes
- ✓ Directors and Strategic Reports.

All bite sized courses are included in membership.

To find out more visit our website
mercia-group.com/online-training

CPD Back to Basics Programme

CPD Back to Basics on-demand courses are ideal for those who would like a refresher in a particular area. Courses require a basic understanding of the topic and include worked examples and a structured explanation of how the rules operate.

NEW FOR 2024

AUDIT	PRICE	CPD HOURS
Back to Basics - Exercising Professional Scepticism and Professional Judgement	£49	0.5
Back to Basics - Understanding the Entity	£49	0.5
Back to Basics - Audit Risk and Planning	£49	0.5
Back to Basics - Fraud Risk Assessment	£49	0.5
Back to Basics - Understanding Internal Controls	£49	0.5
Back to Basics - Understanding ITGCs	£49	0.5
Back to Basics - First Year Audits	£49	0.5
Back to Basics - How to Audit Journals	£49	0.5
Back to Basics - Completion	£49	0.5

[Click here to view details online.](#)

All courses are included in CPD membership, see page 2 for details.

TAX	PRICE	CPD HOURS
Back to Basics - IHT	£158	5
Back to Basics - Taxation of Groups	£79	2
Back to Basics - Capital Gains Tax	£79	2
Back to Basics - Corporation Tax	£79	2
Back to Basics - International Personal Tax - Domicile	£79	2
Back to Basics - International Personal Tax - Residence	£79	2

TAXATION OF TRUSTS

Back to Basics Trusts - Principles and Definitions	£79	2
Back to Basics Trusts - Income Tax	£79	2
Back to Basics Trusts - Capital Gains Tax	£79	2
Back to Basics Trusts - IHT	£79	2

VAT

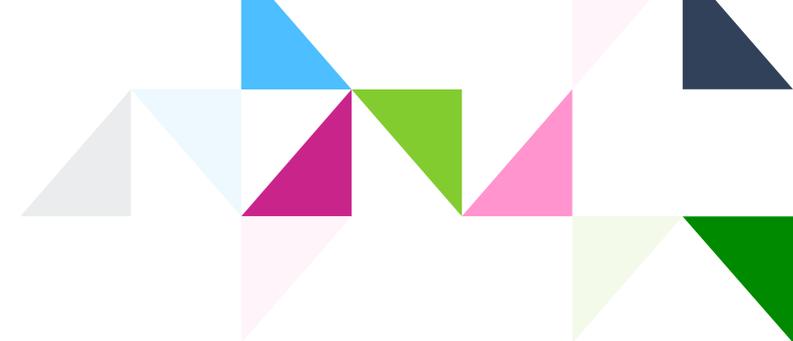
Back to Basics VAT - Registration	£79	1
Back to Basics VAT - Input tax	£79	1
Back to Basics VAT - Partial Exemption	£79	1
Back to Basics VAT - Transfer of Going Concern	£79	1
Back to Basics VAT - Capital Goods Scheme	£79	1
Back to Basics VAT - Option to Tax	£79	1
Back to Basics VAT - Construction	£79	1

NEW FOR 2024

Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing



COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES							ON-DEMAND	
										2024 AVAILABILITY	BACK CATALOGUE
KEY TOPICS											
SIX MONTHLY SPRING											
Accounting and Auditing Update and Refresher - Spring	£79	3	17 Apr (am)	10 Jun (pm)	-	-	-	-	-	06 May	✓
Accounting Update - Spring	£79	1.5	26 Mar (am)	11 Apr (am)	07 May (am)	14 May (am)	-	-	-	27 May	
Audit Update - Spring	£79	1.5	07 May (am)	14 May (am)	-	-	-	-	-	07 May	
SIX MONTHLY AUTUMN											
Accounting and Auditing Update and Refresher - Autumn	£79	3	25 Sep (pm)	16 Oct (am)	-	-	-	-	-	04 Nov	✓
Accounting Update - Autumn	£79	1.5	19 Sep (am)	16 Oct (am)	05 Nov (am)	29 Nov (am)	-	-	-	25 Nov	
Audit Update - Autumn	£79	1.5	05 Nov (am)	29 Nov (am)	-	-	-	-	-	05 Nov	
ANNUAL											
Annual Accountancy Update and Topical Issues	£79	3	13 Feb (pm)	20 Feb (pm)	29 Feb (am)	07 Mar (am)	12 Mar (am)	14 Aug (am)	-	18 Mar	✓
Annual Audit Update and Topical Issues	£79	3	04 Jul (pm)	18 Jul (pm)	-	-	-	-	-	22 Jul	✓
Accounting and Compliance for OMBs - Problems and Practical Solutions	£79	3	17 Oct (pm)	28 Oct (pm)	12 Nov (am)	21 Nov (pm)	05 Dec (am)	-	-	11 Nov	✓
Audit and Accounting Update - PIEs and Large Entities	£79	3	11 Sep (pm)	-	-	-	-	-	-	30 Sep	✓
Ethics Update and Refresher	£79	1	22 May (am)	09 Oct (am)	-	-	-	-	-	10 Jun	✓
Ethics for PIEs and Listed Entities	£79	1	10 Sep (am)	-	-	-	-	-	-	30 Sep	

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Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES							ON-DEMAND	
										2024 AVAILABILITY	BACK CATALOGUE
ANNUAL CONTINUED											
Getting Started with ESG	£79	1	29 Feb (am)	-	-	-	-	-	-	18 Mar	
Festival of CPD - Audit	£199	6	22 Oct	-	-	-	-	-	-	-	
Festival of CPD - Financial Reporting	£199	6	23 Oct	-	-	-	-	-	-	-	
FINANCIAL REPORTING											
Financial Instruments - Accounting Issues	£158	3	18 Jun (am)	-	-	-	-	-	-	08 Jul	✓
Groups - Accounting Issues	£158	3	23 Apr (pm)	12 Sep (am)	-	-	-	-	-	30 Sep	✓
Groups - Reorganisations - Accounting Issues	£79	1	19 Apr (am)	-	-	-	-	-	-	06 May	
IFRS Update and Refresher	£158	3	27 Sep (am)	-	-	-	-	-	-	14 Oct	✓
LLPs - Understanding Their Accounting Requirements	£158	3	08 May (pm)	05 Nov (pm)	-	-	-	-	-	27 May	✓
AUDITING											
Auditing - Regulatory Feedback	£79	1	22 Feb (am)	-	-	-	-	-	-	11 Mar	
Auditing Smaller Businesses - Striking a Balance	£79	2	12 Mar (pm)	30 Sep (pm)	-	-	-	-	-	01 Apr	✓
Data Analytics - What Everyone Needs to Know	£119	2	18 Mar (am)	07 Nov (pm)	-	-	-	-	-	25 Nov	✓
Effective Use of Mercia Audit Methodology	£158	3	25 Jun (am)	14 Nov (pm)	-	-	-	-	-	15 Jul	
Groups - Audit Issues including ISA 600	£158	2	08 Oct (am)	-	-	-	-	-	-	28 Oct	

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Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES							ON-DEMAND	
										2024 AVAILABILITY	BACK CATALOGUE
ISQM 1 Practical Application – The Monitoring and Evaluation Phase (eLearning)	£199	2	-	-	-	-	-	-	-	01 Jan	✓
Practical Aspects of Auditing Your Client's IT Environment - ISA 315	£79	2	09 May (am)	-	-	-	-	-	-	27 May	✓
Root Cause Analysis - A Practical Appraisal	£79	1	09 May (pm)	-	-	-	-	-	-	27 May	✓
Financial Instruments - Auditing Issues	£119	1.5	24 Jun (pm)	-	-	-	-	-	-	22 Jul	
REGULATORY CONCERNS SERIES - AUDIT AND ACCOUNTING											
Regulatory Concerns - Cashflow Statements	£79	1	09 May (am)	-	-	-	-	-	-	27 May	
Regulatory Concerns - Construction Contracts	£79	1	14 May (am)	-	-	-	-	-	-	03 Jun	
Regulatory Concerns - Provisions, Estimates and Judgements	£79	1	18 Apr (am)	-	-	-	-	-	-	06 May	
Regulatory Concerns - Revenue Recognition	£79	1	26 Apr (am)	-	-	-	-	-	-	13 May	
Regulatory Concerns - Taxation - Audit and Accounting	£79	1	02 May (am)	-	-	-	-	-	-	20 May	
CHARITIES											
Charities: Approaching the Charity Audit	£158	3	04 Jul (pm)	-	-	-	-	-	-	27 Jul	✓
Charities: Approaching the Difficult Accounting Areas	£158	3	06 Jun (pm)	-	-	-	-	-	-	24 Jun	✓
Charities: Approaching the Independent Examination	£158	3	16 Jul (pm)	-	-	-	-	-	-	05 Aug	✓

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Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES							ON-DEMAND	
										2024 AVAILABILITY	BACK CATALOGUE
Charities: Current Accounting and Scrutiny Issues	£79	2	25 Apr (am)	09 Dec (pm)	-	-	-	-	-	13 May	✓
SOLICITORS											
SRA Accounts Rules - A Practical Refresher	£158	3	23 Apr (am)	-	-	-	-	-	-	-	-
SRA Accounts Rules Update and Refresher	£158	3	21 Mar (am)	20 May (pm)	-	-	-	-	-	10 Jun	✓
SRA Accounts Rules Workshop	£158	3	13 Nov (am)	-	-	-	-	-	-	-	-
SPECIALIST AREAS											
Academies: Audit and Accounts Update	£158	3	09 Jul (am)	-	-	-	-	-	-	29 Jul	✓
Auditing FCA-regulated Designated Investment Firms [DIFs]	£158	3	23 May (am)	-	-	-	-	-	-	10 Jun	✓
Auditing FCA-regulated Mortgage and General Insurance Brokers [MGIs]	£158	3	22 Oct (am)	-	-	-	-	-	-	11 Nov	✓
Pension Scheme Accounts - Current Issues and Refresher	£158	3	24 Oct (am)	-	-	-	-	-	-	11 Nov	✓
Properties: Accounting and Audit Issues	£158	3	17 Jun (pm)	-	-	-	-	-	-	08 Jul	✓
Transactions between a Company and its Directors - Accounting, Legal and Tax Implications	£79	3	12 Feb (pm)	16 Jul (am)	16 Sep (pm)	12 Dec (am)	-	-	-	05 Aug	✓

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COMPLIANCE



A helping hand for your practice.

Mercia are here to support you, ensuring your practice is compliant with the latest regulations.

We have a range of trusted technical support products and services created and delivered by our experienced technical team.

Technical manuals and compliance reviews include:

- Auditing
- Anti-money laundering
- ISQM
- General practice procedures
- Probate
- Specialist assignments.

We also have a **Technical Queries** service where our experts are on-hand to answer your technical questions.

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To find out more about our support services

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☎ 0330 058 7141

mercia-group.com/support

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Join the ranks of forward-thinking accountants who have embraced the paperless revolution.

Increasingly firms are embracing paperless assignment technology as a means to increase efficiency in their audit work. Mercia works closely with highly respected partners who have developed paperless audit systems.

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Our partners



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SOFTWARE AND METHODOLOGY TRAINING

Mercia has a suite of methodology training for each software partners' paperless platform. It provides you with a basic introduction to using our methodology in the platform.

Using completed examples to demonstrate how key forms and checklists might be completed, our eLearning format makes it easy to digest and to fit around busy schedules.

mercia-group.com/software-partners



Your CPD Programme

Live Streamed and On-Demand

Taxation

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES								ON-DEMAND		
											2024 AVAILABILITY	BACK CATALOGUE	
GENERAL UPDATES													
SPRING													
Tax Update - Spring	£79	3	07 Mar (pm)	14 Mar (am)	18 Mar (pm)	15 Apr (pm)	24 Apr (am)	-	-	-	-	08 Apr	✓
Tax Update - Finance Act	£79	3	01 May (pm)	16 May (pm)	22 May (am)	17 Jun (pm)	18 Jul (am)	-	-	-	-	03 Jun	✓
Annual Tax Update	£79	3	12 Jun (am)	20 Jun (am)	-	-	-	-	-	-	-	08 Jul	✓
Budget - Rapid Reaction	£79	2	tba	-	-	-	-	-	-	-	-	tba	
Rebecca Benneyworth's Spring Tax Update	£79	3	23 Apr (am)	-	-	-	-	-	-	-	-	13 May	✓
Scottish Tax Update	£79	2	13 May (pm)	-	-	-	-	-	-	-	-	03 Jun	
Tax Practitioners Quarterly Update [Q1]	£79	3	21 Mar (pm)	-	-	-	-	-	-	-	-	08 Apr	✓
Tax Practitioners Quarterly Update [Q2]	£79	3	26 Jun (pm)	-	-	-	-	-	-	-	-	15 Jul	✓
Tax Update for Audit and Accounts Staff	£79	1	15 May (am)	18 Jun (am)	-	-	-	-	-	-	-	08 Jul	
AUTUMN													
Tax Update - Autumn	£79	3	09 Sep (pm)	18 Sep (pm)	23 Sep (pm)	25 Sep (am)	01 Oct (am)	17 Oct (am)	23 Oct (pm)	-	-	30 Sep	✓
Rebecca Benneyworth's Autumn Tax Update	£79	3	08 Oct (am)	-	-	-	-	-	-	-	-	28 Oct	✓

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Your CPD Programme

Live Streamed and On-Demand

Taxation

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES										ON-DEMAND		
													2024 AVAILABILITY	BACK CATALOGUE	
AUTUMN CONTINUED															
Tax Update - Current Issues for OMBs	£79	3	04 Nov (pm)	14 Nov (pm)	18 Nov (pm)	21 Nov (pm)	26 Nov (am)	05 Dec (am)	10 Dec (am)	-	-	25 Nov	✓		
Tax Practitioners Quarterly Update [Q3]	£79	3	18 Sep (pm)	-	-	-	-	-	-	-	-	07 Oct	✓		
Tax Practitioners Quarterly Update [Q4]	£79	3	04 Dec (pm)	-	-	-	-	-	-	-	-	23 Dec	✓		
Festival of CPD - Tax	£199	6	24 Oct	-	-	-	-	-	-	-	-	-			
BUSINESS															
Business Structures - Tax Issues	£158	3	10 Oct (am)	-	-	-	-	-	-	-	-	28 Oct	✓		
Capital Allowances - Refresher and Update	£79	3	22 Apr (pm)	08 Oct (pm)	-	-	-	-	-	-	-	28 Oct	✓		
Construction Industry Tax: An Update	£158	3	25 Jun (am)	-	-	-	-	-	-	-	-	15 Jul	✓		
Off-payrolling IR35 and Associated Issues	£119	2	29 Feb (pm)	-	-	-	-	-	-	-	-	18 Mar	✓		
Partnerships - Tax Planning and Tips	£158	3	19 Nov (pm)	-	-	-	-	-	-	-	-	09 Dec	✓		
Tax Succession Planning for the Family Business	£158	3	24 Sep (pm)	09 Oct (pm)	-	-	-	-	-	-	-	28 Oct	✓		
The Effective Use of Business Tax Losses	£158	3	02 May (am)	-	-	-	-	-	-	-	-	20 May	✓		
Unincorporated Businesses - Tax Issues and Planning	£158	3	16 Jul (am)	-	-	-	-	-	-	-	-	05 Aug	✓		

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Taxation

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES										ON-DEMAND	
													2024 AVAILABILITY	BACK CATALOGUE
CORPORATE														
Company Tax Computations - What to Look Out For	£79	3	19 Sep (am)	-	-	-	-	-	-	-	-	-	07 Oct	✓
Company Tax Losses - Getting it Right	£79	2	16 Oct (pm)	-	-	-	-	-	-	-	-	-	04 Nov	✓
Corporation Tax - Six Monthly Update [Spring]	£158	2	20 Mar (am)	-	-	-	-	-	-	-	-	-	08 Apr	✓
Corporation Tax - Six Monthly Update [Autumn]	£158	2	13 Nov (am)	-	-	-	-	-	-	-	-	-	02 Dec	✓
Group Reconstructions: Tax Implications	£158	3	28 Nov (pm)	-	-	-	-	-	-	-	-	-	16 Dec	✓
Tax Reliefs for SMEs - Misc Reliefs	£79	1	27 Feb (pm)	-	-	-	-	-	-	-	-	-	18 Mar	✓
Tax Reliefs for SMEs - Research and Development	£79	1	21 Mar (pm)	-	-	-	-	-	-	-	-	-	08 Apr	✓
PERSONAL AND EMPLOYMENT														
Completing Tax Returns for Individuals: Practical Issues and New Developments	£79	3	13 Jun (am)	-	-	-	-	-	-	-	-	-	01 Jul	✓
Employment Related Securities	£79	1.5	05 Jun (am)	02 Oct (am)	-	-	-	-	-	-	-	-	-	-
Payroll and Employment Taxes - Essential Update	£158	3	07 Mar (am)	18 Mar (pm)	-	-	-	-	-	-	-	-	08 Apr	✓
Payroll Update - Highlights	£79	2	07 Mar (pm)	-	-	-	-	-	-	-	-	-	25 Mar	✓
Pensions Savings: The Tax Issues	£158	3	12 Dec (pm)	-	-	-	-	-	-	-	-	-	23 Dec	✓

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Live Streamed and On-Demand

Taxation

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES									ON-DEMAND	
			21 Feb (am)	26 Feb (pm)	29 Feb (am)	04 Mar (pm)	08 Mar (am)	11 Mar (pm)	-	-	-	2024 AVAILABILITY	BACK CATALOGUE
Personal and Employment Tax Update	£79	3	21 Feb (am)	26 Feb (pm)	29 Feb (am)	04 Mar (pm)	08 Mar (am)	11 Mar (pm)	-	-	-	18 Mar	✓
Share Options	£79	1.5	05 Jun (am)	02 Oct (am)	-	-	-	-	-	-	-	-	-
Taxation of Benefits and Expenses including P11Ds	£79	2	30 Apr (am)	-	-	-	-	-	-	-	-	20 May	✓
LAND AND PROPERTY													
Current Issues in Property Taxation	£158	3	26 Mar (pm)	23 Oct (am)	-	-	-	-	-	-	-	11 Nov	✓
Land Transaction Taxes - Pitfalls and Planning Opportunities	£158	3	18 Apr (pm)	-	-	-	-	-	-	-	-	06 May	-
Residential Property - Capital Gains Tax	£79	2	22 Oct (pm)	-	-	-	-	-	-	-	-	11 Nov	✓
Residential Property - IHT	£79	2	28 Oct (pm)	-	-	-	-	-	-	-	-	18 Nov	✓
Residential Property - Income Tax	£79	2	16 Sep (pm)	-	-	-	-	-	-	-	-	07 Oct	✓
ESTATES, IHT, TRUSTS													
IHT – Current Planning and Key Issues for the General Practitioner	£79	3	27 Feb (pm)	25 Nov (pm)	-	-	-	-	-	-	-	18 Mar	-
Income Tax and CGT- A Guide to Death and Estate Administration	£158	2	07 May (am)	-	-	-	-	-	-	-	-	27 May	✓
Probate and IHT – A Tax Refresher	£158	3	29 Feb (am)	-	-	-	-	-	-	-	-	18 Mar	✓
Trust Planning	£158	3	14 May (pm)	-	-	-	-	-	-	-	-	03 Jun	✓

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Live Streamed and On-Demand

Taxation

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES								ON-DEMAND		
											2024 AVAILABILITY	BACK CATALOGUE	
VAT													
VAT - Spring Update	£79	2	25 Apr (am)	15 May (am)	21 May (pm)	06 Jun (pm)	19 Jun (am)	-	-	-	-	10 Jun	✓
VAT - Autumn Update	£79	2	09 Oct (am)	17 Oct (pm)	24 Oct (pm)	05 Nov (pm)	14 Nov (am)	20 Nov (pm)	27 Nov (am)	04 Dec (pm)	12 Dec (pm)	11 Nov	✓
VAT: Cross Border Trading	£158	3	10 Apr (am)	-	-	-	-	-	-	-	-	29 Apr	✓
VAT: Dealing with Land and Property	£158	3	11 Jun (am)	-	-	-	-	-	-	-	-	01 Jul	✓
OTHER AREAS OF TAX													
Acting for Farmers: An Update	£79	3	14 Jun (am)	-	-	-	-	-	-	-	-	01 Jul	✓
Acting for the High Net Wealth Client	£158	3	06 Nov (pm)	-	-	-	-	-	-	-	-	25 Nov	✓
Capital Gains Tax Refresher	£79	3	15 Mar (am)	06 Sep (am)	-	-	-	-	-	-	-	01 Apr	
Family Tax Planning	£158	3	28 May (pm)	10 Dec (pm)	-	-	-	-	-	-	-	17 Jun	
HMRC Enquiries - A Practical Approach	£79	3	19 Mar (am)	24 Oct (pm)	-	-	-	-	-	-	-	08 Apr	✓
Taxation of Couples - IT, IHT, CGT	£79	3	25 Apr (pm)	05 Dec (pm)	-	-	-	-	-	-	-	13 May	✓
Whole of Life Tax Planning	£79	3	03 Jul (pm)	-	-	-	-	-	-	-	-	22 Jul	✓

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Other Topical Areas

COURSE	CASH PRICE	CPD HOURS	LIVE STREAMED DATES							ON-DEMAND	
										2024 AVAILABILITY	BACK CATALOGUE
OTHER TOPICAL AREAS											
Acting for Doctors - An Update	£158	3	20 Nov (am)	-	-	-	-	-	-	-	
Company Law – Something, Somewhere in the Companies Act	£79	3	19 Jun (am)	17 Oct (am)	-	-	-	-	08 Jul	✓	
Effective Practice Management	£158	2	26 Nov (pm)	-	-	-	-	-	16 Dec	✓	
Employment Law Update for Accountants	£79	1	13 Jun (pm)	-	-	-	-	-	01 Jul	✓	
Finance for the Non Finance Professional - eLearning	£158	5	-	-	-	-	-	-	01 Sep		
Money Laundering Update	£79	1	19 Nov (am)	05 Dec (am)	-	-	-	-	09 Dec		
Money Laundering Update and Refresher	£158	3	19 Nov (pm)	05 Dec (pm)	-	-	-	-	09 Dec	✓	
Practice Assurance - Regulatory Feedback	£79	2	14 Nov (am)	-	-	-	-	-	02 Dec	✓	
Share and Business Valuations	£158	3	13 Jun (pm)	-	-	-	-	-	01 Jul	✓	

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Festival of CPD

Meet your CPD requirements at our live streamed, three day festival of training. With a day each devoted to audit, financial reporting and tax, you can choose which days are relevant to you.

22 October 2024

DAY 1

Auditing

Audit Update and Refresher
Money Laundering Update
Technology in Audit

CPD 6 hours

23 October 2024

DAY 2

Financial Reporting

Accounting Update and Refresher
Laws and Regulations for Accountants
Ethics Update

CPD 6 hours

24 October 2024

DAY 3

Tax

Tax Update and Refresher
Business Tax Issues
VAT Update

CPD 6 hours

Price £199 per day (Included in CPD memberships).

Annual Update Conference

19 – 20 SEPTEMBER 2024

CAMBRIDGE



If you prefer to catch up on your CPD in person in beautiful surroundings, attend our annual residential conference.

This essential conference is an ideal opportunity for the general practitioner to keep up to date with a variety of topical issues. Covering key topics over six engaging sessions, it will support you in providing practical advice to your clients and gaining 10 CPD hours.

This conference is one and a half days starting on Thursday afternoon, including dinner and accommodation.

Price £735

Professional Skills for Qualified Staff

EXCLUSIVE CPD FOR MEMBERS

Our range of short, on-demand courses are between 10 and 30 minutes long, giving you the flexibility to fit them around your working day.

The series includes:

- ✓ Dealing with Difficult Conversations
- ✓ Culture and Diversity
- ✓ Running Effective Meetings
- ✓ Work Life Balance Tips
- ✓ Coaching Skills Tips
- ✓ Negotiation Skills Tips

These are exclusive to our members but we have a wide range of live streamed Skills, Management and Leadership courses. See pages 52-53 for further details.

ADVANCED LEADERSHIP

NEW FOR 2024

For more advanced, executive level leadership courses, we can deliver bespoke in-house programmes, written to meet your firm's needs. Popular topics for advanced courses include strategy development, change management and building organisational effectiveness.

For more information contact us on 0330 058 7141.

Skills, Management and Leadership Programme

Our Skills, Management and Leadership live streamed programme maximises learner engagement by using our state-of-the-art virtual online delivery platform and through restricting class sizes, so that learners are able to interact in small groups and with the trainer.

For an extra £2.50 per person per month, you can have access to all of these courses as part of your CPD Digital PLUS membership.



COURSE	PRICE	CPD HOURS	LIVE STREAMED DATES	
SKILLS, MANAGEMENT AND LEADERSHIP				
Coaching Skills	£100	2	05 Mar (pm)	18 Sep (am)
Delegation and Feedback	£100	2	24 Apr (am)	18 Sep (pm)
Effective Communication	£100	2	18 Apr (am)	26 Sep (am)
Emotional Intelligence	£100	2	18 Apr (pm)	26 Sep (pm)
Forming and Maintaining Client Relationships	£100	2	24 Apr (pm)	01 Oct (am)
Hybrid Meeting Skills	£100	2	23 Apr (pm)	01 Oct (pm)
Leading a Team	£100	2	02 May (pm)	16 Oct (am)
Negotiation Skills	£100	2	14 May (pm)	16 Oct (pm)
Multi-task Management	£100	2	21 May (pm)	05 Nov (am)
People Management	£100	2	06 Jun (pm)	05 Nov (pm)
Performance Management	£100	2	18 Jun (am)	12 Nov (am)
Presenting with Confidence	£100	2	18 Jun (pm)	12 Nov (pm)
Wellbeing and Resilience in the Workplace	£100	2	17 Jul (am)	03 Dec (am)
Working and Communicating with Different Personalities	£100	2	17 Jul (pm)	03 Dec (pm)

Click on the course titles to view details online. 

10% discount available for members, [see page 2 for details](#).

[See page 2](#) for details of our CPD Digital PLUS membership.

In-House Training



Our in-house training gives a more personal approach to meeting your firm's training requirements and needs.

We can cover training in areas such as our Early Careers offering, CPD, Methodology and professional skills. In-house training can be booked as a one-off course or as a structured programme of courses.

Courses and workshops can be delivered either at your own venue and live streamed via Zoom.

Tutor Hire Service

If you have your own material but have a lack of resource or skillset, our experienced lecturers can also deliver your own internal training content.

10% discount available for members.

TALK TO US



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Conferences

From £385, our one-day conferences are designed for partners and managers. The specialist conference topics look at a wide range of practical issues which enable you to provide the best possible advice to your clients.

CONFERENCES	LIVE STREAMED DATES	CPD HOURS
Farming Conference 2023/24	05 Mar	6
Charities Conference	14 Mar	6
Scottish Charities Conference	19 Mar	6
NEW Environmental, Social and Governance Conference	18 Apr	6
Solicitors Conference	24 Apr	6
Practice Conference	23 May	6
Healthcare Conference	05 Jun	6
Academies Update Conference	13 Jun	6
New Managers Conference	19 Jun	6
NEW Leadership in 2024 & Beyond	27 Jun	6
Academies Update Conference	11 Sep	6
Probate Practitioners Conference	18 Sep	6
Annual Update Conference (residential)	19 - 20 Sep*	10
Farming Conference 2024/25	02 Oct	6
Compliance Update Conference	17 Oct	6
Property Conference	07 Nov	6
International Tax Conference	21 Nov	6
Managers Conference	27 Nov	6

* Face-to-face conference.

More conference titles are added throughout the year. Please visit mercia-group.com/conferences for up-to-date details on all of our conferences and how to book.

Certificate in Probate and Estate Administration

Enabling you to provide probate services to your clients

Probate is an area where you can now provide additional support to your clients, save them money and generate more business for your firm.

You may already be providing tax planning and estate accounts services to clients. Facilitating non-contentious probate work is a very natural extension of this existing service.

We have already helped over 800 firms acquire the training and certification needed to apply for a probate licence. We can do the same for you.

How do I become accredited for probate?

To become accredited for probate, you will first need to undertake relevant training and pass an assessment (unless exempt) before submitting an application form to the ICAEW and paying the appropriate fee.

Our Certificate in Probate and Estate Administration involves attending a course and then sitting and passing an assessment.

See opposite for details of the course and assessment.

Further reading

The ICAEW website provides a wealth of information for firms considering applying for accreditation, including full details of the application process, qualification criteria and fees.

Interested in accreditation?

Our Probate courses are run over four half days live streamed, or you can watch an on-demand version.

To obtain the certificate you will need to attend and pass an assessment (pass mark 50%) which you can also complete online.

Course Dates

Course price: **£745**

Live streamed courses - four half days
9.30am to 1.00pm

LIVE STREAMED	ON-DEMAND
11-14 March	Recording available
09-12 Sept	

Assessment Dates

Assessment price: **£225**

All assessments run from
9.30am to 11.30am

ONLINE ASSESSMENT
27-Mar
19-Sep

Already accredited?

You can keep your probate CPD up to date by attending our annual Probate Practitioners Conference, see [page 55](#) for details.

All prices are subject to VAT.

 Please call us for more information on **0330 058 7141**.





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