



2025 Training Programme

Supporting your
Professional Development

In partnership with



mercia-group.com/solent

Welcome to Solent 2025 Training Programme

Solent Accountancy Training, in partnership with Mercia Group, is delighted to present our 2025 training programme.

Together, we continue to support Solent firms of all accounting and tax associations and institutes in meeting their CPD requirements, through an extensive programme of technical and professional skills training, offered in a variety of formats.

Look out for our programme of face-to-face courses running in the Solent area.

All prices in
this brochure
exclude VAT



Membership

Pay a monthly fee per
person



Pay as You Go

Pay per person
per course



In-House Training

Courses delivered
exclusively to your team



Bespoke Packages

Build your own solution

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Explore our interactive links by clicking on the course titles within this brochure



Training Membership Options

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



CPD Digital

Access to all online CPD courses, including live streamed and on-demand.



Early Careers Digital

Access to all online Early Careers courses in the pathway.



PLUS Management and Leadership

Access to all online CPD courses PLUS Management and Leadership courses.



PLUS Face-to-Face

Access to all online CPD courses PLUS face-to-face courses.

Included in Solent Membership:

- Unlimited access to all course titles in your membership
- Verifiable CPD records
- Firm-wide CPD tracking
- Exclusive CPD Monthly Bulletin video updates
- Exclusive Members' events: Ask the Expert and Insights from Experts
- Discounts on Mercia products and services
- Complete Regulatory Training Series
- Future Ready Skills Series
- Professional Skills on-demand training

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

2025 Highlights



NEW Masterclasses

Taking extracts from our popular Conference programme, Mercia Masterclasses offer a unique opportunity to hear from experts in specialist areas without having to attend the full conference event.

See page 48 for details.



NEW Monthly update bulletins for Members

Our new monthly update, exclusively for members, brings a roundup of the Tax, Auditing, Accounting and Regulatory issues over the previous month. Delivered on-demand, our monthly bulletins are ideal for team meetings or training sessions or for members to keep their CPD up to date.



NEW Mercia Certificates in IFRS and UK GAAP

New for 2025 is a series of interactive online eLearning modules covering the details of the standards with practical examples and case studies. Modules can be consumed individually or completion of the entire series earns learners a certificate to showcase their expertise.

See page 34 for details.



Festival of CPD

Meet your CPD requirements with our live streamed three-day festival of training.

See pages 28-29 and 38-39 for details.



NEW Firm-wide Future Ready Skills

The skills the profession needs now and in the future are evolving rapidly. Mercia's Future Ready Skills series helps firms and professionals understand and develop the skills that will enable them to thrive in a world shaped by rapidly changing technology.

See page 9 for details.



NEW Verifiable CPD Pathways

To make it easier for firms and individuals to identify the CPD they should be completing over the year, we have bundled our courses together into suggested pathways to help you meet your verifiable CPD hours. We support all professional bodies.

See pages 20-21 for details.



Award-winning Early Careers Auditing Skills Series

Winner of the 'Digital Innovation' award at the International Accountancy Forum and Awards, our on-demand and interactive eLearning modules offer a fresh approach to audit training and are designed to be completed at the most appropriate time for your trainee's role and experience.

See pages 10-11 for details.



Your Training, Your Way

We recognise that one size doesn't fit all and offer our clients flexible learning solutions in a variety of formats.

Mercia Technical Team

Mercia has a dedicated, experienced in-house team of technical specialists who write and deliver our training programmes. This unique position allows us to respond swiftly to the rapidly changing technical landscape and our client's demands.



Live Streamed

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



On-Demand Recordings

Mercia's on-demand courses offer you and your team the flexibility to learn at a time and in a place that works best. Recordings are available for 12 months from the release date and are broken down into chapters, allowing you to focus on the topics most relevant to your requirements.



eLearning

Our award-winning multimedia eLearning is interactive and engaging. With features such as knowledge checks and tests, interactive videos, case studies and tutor-recorded debriefs, our rich eLearning supports the effectiveness and retention of learning.



Bite Sized

Mercia's bite sized programme are on-demand modules, each less than 30 minutes long. The programme includes extracts from our key updates and topical issues and will develop throughout the year.



Face-to-Face

Mercia is proud to offer our clients a face-to-face CPD programme in various locations across the country. Our programme of core updates provide those who prefer the dedicated face-to-face experience with the flexibility to choose this format.

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



Firm-wide Regulatory Training

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 Update and Refresher

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

Regulatory Training Series Pricing

Included in membership:

| No. of partners | Price* |
|-----------------|--------|
| 1 | £145 |
| 2 to 4 | £455 |
| 5 to 9 | £720 |
| 10 to 19 | £1,140 |
| 20+ | POA |

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



For more details and to purchase, please call us on **0330 058 7141**

Future Ready Skills Series

Get firm-wide access to our on-demand courses





Mercia is excited to collaborate with Daniel Clark, an **AI-assisted business expert**, to bring you a series of courses to equip you with essential skills in AI, data analysis, and cloud computing.


Specialising in AI, digital literacy, and professional skills training, Daniel delivers actionable insights for digital transformation.


Each course is approximately one hour in length and can be purchased individually or can be purchased for firm-wide access.

The series covers four areas

- 

What is AI and What Does it Mean for Accountants?
- 

Using and Communicating with Data
- 

Building a Tech-Enabled Organisation
- 

Digital Mindset and Skills

| Prices for firm-wide access | |
|-----------------------------|----------------------|
| No. of Partners | For 12 months access |
| 1 | £165 |
| 2 to 4 | £600 |
| 5 to 9 | £1,160 |
| 10 to 19 | £2,490 |
| 20 + | POA |

Included in membership.

To enrol on individual courses see **pages 46-47**

To find out more visit our [website](#)

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.

KEY

On-Demand

Tutor-Led Live Streamed

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

Accounting

Auditing

Tax

Professional Skills



| |
|--|
| Regulatory Training Series |
| Bookkeeping: The First Principles |
| Bookkeeping: The Next Stage |
| Bookkeeping Case Study |
| Introduction to VAT |
| Preparing and Finalising Accounts |
| Introduction to Accounting for Different Taxes |

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|---|
| Regulatory Training Series |
| Auditing Skills Series - Year 1 |
| Introduction to Audit and How to Audit Case Study |

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|---|
| Regulatory Training Series |
| Introduction to VAT |
| Introduction to PAYE and NI |
| Introduction to Taxation of Individuals |
| Introduction to Capital Gains Tax |
| Calculating Trade Profits |
| Capital Allowances - The Basics |
| Unincorporated Tax Case Study |

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| Making the Right Start with Colleagues and Clients |
| Communicating Effectively |
| Professional Skills for Trainees - Year 1 |
| Mental Health and Wellbeing Series |
| Time Management |



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|---|
| Understanding Company Accounts |
| Preparing Accounts More Complex Issues |
| Accounts Finalisation and Interviewing Skills |

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| Auditing Skills Series - Year 2 |
| How to Audit More Complex Areas Case Study |

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| Corporation Tax Issues |
| Capital Allowances - The Next Stage |
| Employment Benefits and P11Ds |
| Introduction to Taxation of Property Income |
| VAT Issues for Trainees |
| Incorporated Business Tax Case Study |

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|---|
| Making Decisions and Prioritising |
| Writing Skills |
| Professional Skills for Trainees - Year 2 |
| Mental Health and Wellbeing Series |



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| Introduction to Deferred Tax |
| Accounting Refresher and Update for Trainees |
| Practical Accounting for Trainees |

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| Auditing Skills Series - Year 3 |
| Accounting Refresher and Update for Trainees |
| Becoming an Audit In-Charge |

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| Corporation Tax Losses - Next Steps |
| General Tax Update for Trainees |
| Introduction to Inheritance Tax |
| Introduction to Trusts |
| Introduction to International Aspects of Personal Tax |

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|---|
| Presentation Skills |
| Professional Skills for Trainees - Year 3 |

Click on the course titles to explore more



Early Careers Pathways

AWARD WINNING Auditing Skills Series

Using case studies to complete audit tests as they would on a real audit, the auditing skills series enables trainees to put learning into practice right away.

Accounting

As accounting forms the foundation across all disciplines, we have a range of courses to support trainees in this area plus more specialist courses to support those working in this discipline as they progress.

Tax

Whatever route your trainees take, you can choose from our selection of tax courses to complement their study or work in the office.

Professional Skills

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.

Specialist Assignments



In addition to the Pathways, we have introductory courses covering the following specialist areas:

- 🕒 [Introduction to Academies](#)
- 🕒 [Introduction to Acting for FCA Clients](#)
- 🕒 [Introduction to SRA Accounts Rules](#)
- 🕒 [Introduction to Charities](#)
- 🕒 [Introduction to Pension Schemes](#)

All Early Careers courses are included in Early Careers membership, see page 3 for details.


Price from £83
per trainee per title

Early Careers

Tutor-Led Live Streamed

| COURSE | PRICE | DURATION | TUTOR LED LIVE STREAMED DATES | | | | | |
|--|-------|----------|-------------------------------|-------------|-------------|-------------|-------------|-------------|
| ACCOUNTING | | | | | | | | |
| Bookkeeping: The First Principles | £166 | 1 day | 13 Jan | 24 Feb | 1 Sep | 8 Sep | 15 Sep | 22 Sep |
| Bookkeeping: The Next Stage | £166 | 1 day | 14 Jan | 25 Feb | 2 Sep | 9 Sep | 16 Sep | 23 Sep |
| Bookkeeping Case Study | £332 | 2 days | 15 - 16 Jan | 26 - 27 Feb | 3 - 4 Sep | 10 - 11 Sep | 17 - 18 Sep | 24 - 25 Sep |
| Preparing and Finalising Accounts | £166 | 1 day | 6 Mar | 16 Oct | 6 Nov | | | |
| Accounts Finalisation and Interviewing Skills | £166 | 1 day | 1 Apr | 7 May | 10 Nov | 2 Dec | | |
| Practical Accounting for Trainees | £332 | 2 days | 9 - 10 Apr | 19 - 20 May | 6 - 7 Oct | 17 - 18 Nov | | |
| AUDITING | | | | | | | | |
| Introduction to Audit and How to Audit Case Study | £498 | 3 days | 27 - 29 Jan | 16 - 18 Jun | 10 - 12 Nov | 8 - 10 Dec | | |
| How to Audit More Complex Areas Case Study | £332 | 2 days | 25 - 26 Mar | 27 - 28 May | 20 - 21 Oct | 12 - 13 Nov | | |
| Becoming an Audit In-Charge | £166 | 1 day | 15 May | 3 Nov | | | | |
| TAX | | | | | | | | |
| Unincorporated Tax Case Study | £83 | ½ day | 19 May (am) | 11 Jun (am) | 11 Nov (am) | 3 Dec (am) | | |
| Incorporated Business Tax Case Study | £83 | ½ day | 6 May (am) | 17 Jun (am) | 20 Nov (am) | 2 Dec (am) | | |
| General Tax Update for Trainees | £166 | 1 day | 10 Jun | | | | | |
| PROFESSIONAL SKILLS | | | | | | | | |
| Making the Right Start with Colleagues and Clients | £83 | ½ day | 17 Jan (am) | 28 Feb (am) | 05 Sep (am) | 12 Sep (am) | 19 Sep (am) | 26 Sep (am) |
| Professional Skills for Trainees - Year 1 | £166 | 1 day | 8 May | 25 Sep | 14 Oct | 19 Nov | | |
| Professional Skills for Trainees - Year 2 | £166 | 1 day | 21 May | 1 Oct | 4 Nov | 4 Dec | | |
| Professional Skills for Trainees - Year 3 | £166 | 1 day | 5 June | 16 Oct | 26 Nov | 17 Dec | | |



EARLY CAREERS MEMBERSHIP

All early careers tutor-led courses are included, see page 2 for details.



COURSE WEB LINKS

Click on the course titles above to view details online.



TERMS AND CONDITIONS

For full details on our terms, please visit our website.



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.



Accounting

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| Navigating Ethical Requirements in 2025 |
| Introduction to Group Accounting Issues |
| Introduction to Transactions Between Companies and Directors |
| Efficient File Completion |
| SRA Accounts Rules Workshop - Practical Problems |
| SRA Accounts Rules Workshop - Life Cycle of an Assignment |

Auditing

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|--|
| Navigating Ethical Requirements in 2025 |
| Bridging the Gap - Audit Senior to Audit Manager |
| Challenge of Management |
| How to Review an Audit File |

Tax

| |
|--|
| Navigating Ethical Requirements in 2025 |
| Introduction to Taxation of Corporate Groups |
| Introduction to Taxation of Partnerships |
| Introduction to Tax Governance |
| Introduction to VAT Risk and Opportunities |
| Introduction to Dealing with Tax Enquiries |
| Practical General Tax Update |

Professional Skills

| |
|-------------------------------------|
| Module 1 - Stepping into Management |
| Module 2 - You as a Manager |
| Module 3 - Succeeding at Management |
| Delivering an Effective Appraisal |

KEY

On-Demand

Tutor-Led Live Streamed

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



CPD MEMBERSHIP

All courses in this pathway are included.



COURSE WEB LINKS

Click on the course titles above to view details online.



ADVANCED SKILLS COURSES

See our Skills, Management and Leadership programme on pages 52-53.



TERMS AND CONDITIONS

For full details on our terms, please visit our website.

Progression to Management

Tutor-Led Live Streamed

| COURSE | PRICE | DURATION | LIVE STREAMED DATES | |
|--|-------|----------|---------------------|-------------|
| ACCOUNTING | | | | |
| Introduction to Group Accounting Issues | £83 | ½ day | 12 Jun (am) | 19 Nov (am) |
| Introduction to Transactions Between Companies and Directors | £83 | ½ day | 8 May (am) | 24 Oct (am) |
| Efficient File Completion | £83 | ½ day | 6 May (am) | 13 Nov (am) |
| SRA Accounts Rules Workshop - Practical Problems | £166 | ½ day | 10 Apr (am) | |
| SRA Accounts Rules Workshop - Life Cycle of an Assignment | £166 | ½ day | 20 Nov (am) | |
| AUDITING | | | | |
| Bridging the Gap - Audit Senior to Audit Manager | £83 | ½ day | 10 Jun (am) | 23 Oct (am) |
| How to Review an Audit File | £83 | ½ day | 25 Jun (am) | 22 Oct (am) |
| TAX | | | | |
| Practical General Tax Update | £166 | 1 day | 18 Jun | |
| PROFESSIONAL SKILLS | | | | |
| Module 1 - Stepping into Management | £166 | 1 day | 19 Mar | 16 Sep |
| Module 2 - You as a Manager | £166 | 1 day | 29 May | 28 Oct |
| Module 3 - Succeeding at Management | £166 | 1 day | 23 Jun | 25 Nov |



CPD MEMBERSHIP
All courses in this pathway are included.



COURSE WEB LINKS
Click on the course titles above to view details online.



ADVANCED SKILLS COURSES
See our Skills, Management and Leadership programme on pages 52-53.



TERMS AND CONDITIONS
For full details on our terms, please visit our website.



Suggested CPD Pathways

Based on the ICAEW regulations, we have suggested pathways to help you to complete your CPD requirements depending on your technical specialism.



CATEGORIES

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



CATEGORY 3

10 or more hours of verifiable CPD.

(Including 1 hour of Ethics training)



CATEGORY 2

20 hours verifiable CPD. Category 3 requirements plus 10 or more verifiable hours.

(Most ACCA members will fall into Category 2)



CATEGORY 1

30 hours verifiable CPD. Category 2 requirements plus 10 or more verifiable hours.

AUDIT

Navigating Ethical Requirements in 2025 (1 hour)

A&A update - what you need to know in Spring 2025 (3 hours)

A&A Update - what you need to know in Autumn 2025 (3 hours)

Tax Update for Audit and Accounts Staff (1 hour)

Review of Recent Feedback from Auditing Monitoring Bodies (1 hour)

Sustainability Reporting - An Update on the Changing Legislative Environment (1 hour)

Regulatory Concerns Series (1 hour each)

- Cashflow statements
- Construction Contracts
- Going Concern
- Provisions, Estimates and Judgements
- Revenue Recognition
- Taxation (Audit and Accounting)
- Money Laundering Update

Introduction to Using Technology in Audit (2 hours)

Specialist training eg Groups, Pensions, Properties, Charities, SRA (up to 1 hour)

IFRS Update and Refresher for 2025 (3 hours)

Ethics for PIEs and Listed Entities (1 hour)

A&A Issues for PIEs and Larger Entities (2 hours)

Group Audit Issues including ISA 600 (2 hours)

Specialist training eg Groups, Pensions, Properties, Charities, SRA (up to 2 hours)

GENERAL PRACTICE (NON-AUDIT)

Navigating Ethical Requirements in 2025 (1 hour)

Accounting - What's New for Spring 2025 (1.5 hours)

Accounting - What's New for Autumn 2025 (1.5 hours)

Annual Tax Roundup for 2025 (3 hours)

The Practicalities of Accounting and Compliance for OMBs (3 hours)

Regulatory Concerns Series (1 hour each)

- Cashflow statements
- Construction Contracts
- Going Concern
- Provisions, Estimates and Judgements
- Revenue Recognition
- Taxation (Audit and Accounting)
- Money Laundering Update

Sustainability Reporting - An Update on the Changing Legislative Environment (1 hour)

Specialist training eg Groups, Pensions, Properties, Charities, SRA (up to 2 hours)

IFRS Update and Refresher for 2025 (3 hours)

Ethics for PIEs and Listed Entities (1 hour)

Group Accounting Issues (2 hours)

Specialist training eg Pensions, Properties, Charities, SRA (up to 4 hours)

TAX

Navigating Ethical Requirements in 2025 (1 hour)

Tax Update - What's New for Spring 2025 (3 hours)

Tax Update - A Deep Dive into the Finance Act 2025 (3 hours)

Tax Update - What's New for Autumn 2025 (3 hours)

Budget Rapid Reaction (2 hours)

Corporation Six Monthly Update - Spring (2 hours)

Corporation Six Monthly Update - Autumn (2 hours)

Tax Update - Practical and Current Issues for OMBs (3 hours)

Minimum of 1 hour of additional relevant content

Specialist training eg High Net Wealth Clients, Trusts, Capital Taxes, Probate, Land Transaction Taxes, VAT, Tax Practitioners Quarterly Updates (up to 10 hours)



Your Solent CPD Programme

Covering Bournemouth, Eastleigh,
Southampton and Whiteley

| COURSE | | | | | | | ON-DEMAND | |
|--|-------------|-------------|-------------|------------------|-------------|-------------|-------------------|-----------------|
| | MERCIA LIVE | | BOURNEMOUTH | EASTLEIGH | SOUTHAMPTON | WHITELEY | 2025 AVAILABILITY | BACK CATALOGUE* |
| ACCOUNTING AND AUDITING | | | | | | | | |
| An Annual Round-up of What's New and Topical in Accounting in 2025 | 25 Mar (pm) | 14 Aug (am) | 27 Mar (am) | - | - | 29 Apr (am) | 1 May | ✓ |
| An Annual Round-up of What's New and Topical in Audit in 2025 | 14 Jul (am) | - | - | - | - | 25 Jun (am) | 5 Aug | ✓ |
| The Practicalities of Accounting and Compliance for OMBs | 10 Nov (pm) | 4 Dec (am) | - | - | 22 Oct (am) | - | 24 Nov | ✓ |
| TAXATION | | | | | | | | |
| Tax Update - A Deep Dive into the Finance Act 2025 | 19 May (pm) | 10 Jul (pm) | 8 May (am) | 5 Jun (am) | - | - | 9 Jun | ✓ |
| Property Taxes - A Current View | 29 Apr (pm) | 13 Nov (am) | - | - | - | 23 Sep (am) | 19 May 1 Dec | ✓ |
| Tax Update - Practical and Current Issues for OMBs | 27 Nov (pm) | 2 Dec (am) | - | 11 Nov (am) | - | - | 10 Dec | ✓ |
| OTHER | | | | | | | | |
| Self-reflection and Leadership Development | - | - | - | 6 Nov (full day) | - | - | | |

*2024 recording of equivalent title



MEMBERS ONLY

Members enjoy firm-wide access to CPD courses, see page 2 for details.



COURSE WEB LINKS

Click on the course titles above to view details online.



BACK CATALOGUE

Our current version is available to view and download online.



TERMS AND CONDITIONS

For full details on our terms, please visit our website.



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.

| AUDIT | PRICE | CPD HOURS |
|--|-------|-----------|
| Back to Basics - Exercising Professional Scepticism and Professional Judgement | £50 | 0.5 |
| Back to Basics - Understanding the Entity | £50 | 0.5 |
| Back to Basics - Audit Risk and Planning | £50 | 0.5 |
| Back to Basics - Fraud Risk Assessment | £50 | 0.5 |
| Back to Basics - Understanding Internal Controls | £50 | 0.5 |
| Back to Basics - Understanding ITGCs | £50 | 0.5 |
| Back to Basics - First Year Audits | £50 | 0.5 |
| Back to Basics - How to Audit Journals | £50 | 0.5 |
| Back to Basics - Completion | £50 | 0.5 |
| TAX | PRICE | CPD HOURS |
| Back to Basics - IHT | £166 | 5 |
| Back to Basics - Taxation of Groups | £83 | 2 |
| Back to Basics - Capital Gains Tax | £83 | 2 |
| Back to Basics - Corporation Tax | £83 | 2 |
| Back to Basics - International Personal Tax - Residence | £83 | 2 |

| TAXATION OF TRUSTS | PRICE | CPD HOURS |
|--|-------|-----------|
| Back to Basics Trusts - Principles and Definitions | £83 | 2 |
| Back to Basics Trusts - Income Tax | £83 | 2 |
| Back to Basics Trusts - Capital Gains Tax | £83 | 2 |
| Back to Basics Trusts - IHT | £83 | 2 |
| VAT | PRICE | CPD HOURS |
| Back to Basics VAT - Registration | £83 | 1 |
| Back to Basics VAT - Input Tax | £83 | 1 |
| Back to Basics VAT - Partial Exemption | £83 | 1 |
| Back to Basics VAT - Transfer of Going Concern | £83 | 1 |
| Back to Basics VAT - Capital Goods Scheme | £83 | 1 |
| Back to Basics VAT - Option to Tax | £83 | 1 |
| Back to Basics VAT - Construction | £83 | 1 |

Click on titles to view details online.



CPD MEMBERSHIP

All courses are included in CPD memberships, see page 2-3 for details.



COURSE WEB LINKS

Click on the course titles above to view details online.



BACK CATALOGUE

Our current version is available to view and download online.



TERMS AND CONDITIONS

For full details on our terms, please visit our website.



Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing

| | | | | | | | ON-DEMAND | | | |
|--|------------|-----------|---------------------|-------------|-------------|-------------|-------------------|------------|-----------------|--|
| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | 2025 AVAILABILITY | E-LEARNING | BACK CATALOGUE* | |
| SIX MONTHLY SPRING | | | | | | | | | | |
| Accounting and Audit - What You Need to Know in Spring 2025 | £83 | 3 | 22 May (am) | 4 Jun (pm) | - | - | 11 Jun | | ✓ | |
| Accounting - What's New for Spring 2025 | £83 | 1.5 | 19 Mar (am) | - | - | - | 7 Apr | | ✓ | |
| Auditing - What's New for Spring 2025 | £83 | 1.5 | 1 Apr (am) | 26 Jun (am) | - | - | 21 Apr | | ✓ | |
| SIX MONTHLY AUTUMN | | | | | | | | | | |
| Accounting and Audit - What You Need to Know in Autumn 2025 | £83 | 3 | 3 Sep (pm) | 16 Oct (am) | - | - | 23 Sep | | ✓ | |
| Accounting - What's New for Autumn 2025 | £83 | 1.5 | 2 Oct (am) | - | - | - | 20 Oct | | ✓ | |
| Auditing - What's New for Autumn 2025 | £83 | 1.5 | 5 Nov (am) | - | - | - | 24 Nov | | ✓ | |
| ANNUAL | | | | | | | | | | |
| An Annual Roundup of What's New and Topical in Accounting in 2025 | £83 | 3 | 27 Feb (am) | 25 Mar (pm) | 14 Apr (pm) | 14 Aug (am) | 1 May | | ✓ | |
| An Annual Roundup of What's New and Topical in Audit in 2025 | £83 | 3 | 14 Jul (am) | - | - | - | 5 Aug | | ✓ | |
| Audit and Accounting Issues - PIEs and Large Entities | £83 | 2 | - | - | - | - | 1 Nov | ✓ | ✓ | |
| Getting Started with ESG | £83 | 1 | 13 Feb (am) | - | - | - | 3 Mar | | ✓ | |
| Navigating Ethical Requirements in 2025 | £83 | 1 | 2 Jul (am) | - | - | - | 14 Jul | | ✓ | |
| Sustainability Reporting - An Update on the Changing Legislative Environment | £83 | 1 | 3 Jul (am) | - | - | - | 21 Jul | | | |

*2024 recording of equivalent title



MEMBERS ONLY

Members enjoy firm-wide access to CPD courses, see page 2 for details.



COURSE WEB LINKS

Click on the course titles above to view details online.



BACK CATALOGUE

Our current version is available to view and download online.



TERMS AND CONDITIONS

For full details on our terms, please visit our website.



Your CPD Programme

Live Streamed and On-Demand

Accounting and Auditing

| COURSE | CASH PRICE | CPD HOURS | | | | | ON-DEMAND | | |
|--|------------|-----------|-------------|-------------|------------|---|-------------------|------------|-----------------|
| | | | | | | | 2025 AVAILABILITY | E-LEARNING | BACK CATALOGUE* |
| The Practicalities of Accounting and Compliance for OMBs | £83 | 3 | 24 Oct (am) | 10 Nov (pm) | 4 Dec (am) | - | 24 Nov | | ✓ |
| Ethics for PIEs and Listed Entities | £83 | 1 | - | - | - | - | 1 Nov | ✓ | ✓ |
| Festival of CPD - Audit | £199 | 6 | 21 Oct | - | - | - | | | |
| Festival of CPD - Financial Reporting | £199 | 6 | 22 Oct | - | - | - | | | |
| FINANCIAL REPORTING | | | | | | | | | |
| Financial Instruments - Accounting Issues | £83 | 1 | - | - | - | - | 1 Sep | ✓ | ✓ |
| Financial Instruments - Accounting Issues More Complex Issues | £83 | 1 | - | - | - | - | 1 Sep | ✓ | |
| Groups - Accounting Issues | £166 | 3 | - | - | - | - | 1 Sep | ✓ | ✓ |
| Groups - Reorganisations - Accounting Issues | £83 | 1 | - | - | - | - | 1 Sep | ✓ | ✓ |
| IFRS Update and Refresher for 2025 | £166 | 3 | 30 Sep (am) | - | - | - | 20 Oct | | ✓ |
| LLPs - Understanding Their Accounting Requirements | £166 | 3 | - | - | - | - | 1 Sep | ✓ | ✓ |
| Navigating the Director's Report and Strategic Report Requirements | £83 | 1 | 9 Sep (am) | - | - | - | 29 Sep | | |
| AUDITING | | | | | | | | | |
| Auditing the Complex World of Financial Instruments | £125 | 1.5 | 5 Jun (am) | - | - | - | 23 Jun | | ✓ |
| Groups - Audit Issues including ISA 600 | £166 | 2 | - | - | - | - | 1 Oct | ✓ | ✓ |

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Live Streamed and On-Demand

Accounting and Auditing

| | | | | | | | ON-DEMAND | | |
|--|------------|-----------|----------------------------|---|---|---|-------------------|------------|-----------------|
| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | 2025 AVAILABILITY | E-LEARNING | BACK CATALOGUE* |
| Introduction to Using Technology in Audit | £83 | 2 | 30 Apr <small>(am)</small> | - | - | - | 19 May | | |
| ISQM 1 Practical Application - The Monitoring and Evaluation Phase | £199 | 2 | - | - | - | - | 1 May | ✓ | ✓ |
| Mercia's Opinion on Auditing Smaller Businesses | £83 | 2 | 13 Mar <small>(pm)</small> | - | - | - | 31 Mar | | ✓ |
| Practical Aspects of Auditing Your Client's IT Environment - ISA 315 | £83 | 2 | - | - | - | - | 1 Nov | ✓ | ✓ |
| Review of Recent Feedback from Auditing Monitoring Bodies | £83 | 1 | 25 Feb <small>(am)</small> | - | - | - | 17 Mar | | ✓ |
| Root Cause Analysis - A Practical Appraisal | £83 | 1 | 7 Jul <small>(am)</small> | - | - | - | 21 Jul | | ✓ |
| Using Mercia Audit Methodology to Maximise Efficiency and Quality | £166 | 3 | 17 Jun <small>(am)</small> | - | - | - | 7 Jul | | ✓ |
| REGULATORY CONCERNS SERIES - AUDIT AND ACCOUNTING | | | | | | | | | |
| Regulatory Concerns - Cashflow Statements | £83 | 1 | 3 Mar <small>(am)</small> | - | - | - | 17 Mar | | ✓ |
| Regulatory Concerns - Construction Contracts | £83 | 1 | 17 Mar <small>(am)</small> | - | - | - | 31 Mar | | ✓ |
| Regulatory Concerns - Going Concern | £83 | 1 | 25 Mar <small>(am)</small> | - | - | - | 14 Apr | | |
| Regulatory Concerns - Provisions, Estimates and Judgements | £83 | 1 | 11 Mar <small>(am)</small> | - | - | - | 31 Mar | | ✓ |
| Regulatory Concerns - Revenue Recognition | £83 | 1 | 14 Mar <small>(am)</small> | - | - | - | 31 Mar | | ✓ |
| Regulatory Concerns - Taxation (Audit and Accounting) | £83 | 1 | 1 Apr <small>(am)</small> | - | - | - | 21 Apr | | ✓ |

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Accounting and Auditing

| | | | | | | | ON-DEMAND | | | |
|--|------------|-----------|---------------------|-------------|---|---|-------------------|------------|-----------------|--|
| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | 2025 AVAILABILITY | E-LEARNING | BACK CATALOGUE* | |
| CHARITIES | | | | | | | | | | |
| Charities - Current Accounting and Scrutiny Issues | £83 | 2 | 20 Mar (am) | 15 Oct (pm) | - | - | 7 Apr | | ✓ | |
| Charities - Approaching the Charity Audit | £166 | 3 | - | - | - | - | 1 Jun | ✓ | ✓ | |
| Charities - Approaching the Difficult Accounting Areas | £166 | 3 | - | - | - | - | 1 Jun | ✓ | ✓ | |
| Charities - Approaching the Independent Examination | £166 | 3 | - | - | - | - | 1 Jun | ✓ | ✓ | |
| SPECIALIST AREAS | | | | | | | | | | |
| Academies - Accounts Direction Update | £83 | 1 | 8 Jul (am) | - | - | - | 28 Jul | | ✓ | |
| Auditing FCA - Regulated Investment Firms | £166 | 3 | 22 May (pm) | - | - | - | 9 Jun | | ✓ | |
| Auditing FCA - Regulated Mortgage and General Insurance Brokers (MGIs) | £166 | 3 | 20 Oct (pm) | - | - | - | 3 Nov | | ✓ | |
| Demystifying Transactions between a Company and its Directors | £83 | 3 | 13 May (am) | 19 Jun (pm) | - | - | 7 Jul | | ✓ | |
| Pension Scheme Accounts - The Key Issues | £166 | 2 | 11 Sep (pm) | - | - | - | 29 Sep | | ✓ | |
| Properties - Accounting Issues | £83 | 1 | - | - | - | - | 1 Sep | ✓ | ✓ | |
| Properties - Audit Issues | £83 | 1 | - | - | - | - | 1 Nov | ✓ | ✓ | |
| SRA Accounts Rules - What You Need to Know for Your 2025 Assignments | £166 | 2 | 20 May (pm) | - | - | - | 9 Jun | | ✓ | |

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UK GAAP and IFRS Libraries

NEW for 2025 Mercia is creating interactive on-demand libraries of UK GAAP and IFRS modules, covering all areas of each GAAP.

Discount for
CPD members



Each module covers the requirements of the standards and uses interactive case studies and examples to reinforce the learning. Learners who complete the entire series in each library will achieve certification from Mercia in Autumn 2025. Modules can be purchased individually or the entire suite can be purchased as a package and will be automatically made available as they are released.

Contact us

- ✉ sales@mercia-group.com
- ☎ 0330 058 7141
- 🌐 UK GAAP certificate
- 🌐 IFRS certificate



In-House Training

Our in-house training gives a more personal approach to meeting your firm's training 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 at your own venue and/or 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 to your team members.

Talk to us

For more information or to discuss your in-house training requirements please contact:

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- ☎ 0330 058 7141
- 🌐 mercia-group.com/inhouse

Your CPD Programme

Live Streamed and On-Demand

Taxation

| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | ON-DEMAND | |
|--|------------|-----------|---------------------|-------------|-------------|-------------|-------------------|-----------------|
| | | | | | | | 2025 AVAILABILITY | BACK CATALOGUE* |
| GENERAL UPDATES | | | | | | | | |
| Annual Tax Roundup for 2025 | £83 | 3 | 17 Jun (am) | 1 Jul (am) | - | - | 14 Jul | ✓ |
| Budget - Mercia's Rapid Reaction | £83 | 2 | TBA | - | - | - | TBA | ✓ |
| Rebecca Benneyworth's Spring Tax Update | £83 | 3 | 8 Apr (am) | - | - | - | 28 Apr | ✓ |
| Rebecca Benneyworth's Autumn Tax Update | £83 | 3 | 25 Sep (am) | - | - | - | 13 Oct | ✓ |
| Scottish Tax Update - What's Key in 2025 | £83 | 1 | 12 Jun (pm) | - | - | - | 30 Jun | ✓ |
| Tax Practitioners Quarterly Update [Q1] | £83 | 3 | 20 Mar (pm) | - | - | - | 7 Apr | ✓ |
| Tax Practitioners Quarterly Update [Q2] | £83 | 3 | 12 Jun (pm) | - | - | - | 30 Jun | ✓ |
| Tax Practitioners Quarterly Update [Q3] | £83 | 3 | 24 Sep (pm) | - | - | - | 13 Oct | ✓ |
| Tax Practitioners Quarterly Update [Q4] | £83 | 3 | 11 Dec (pm) | - | - | - | 22 Dec | ✓ |
| Tax Update - What's New for Spring 2025 | £83 | 3 | 6 Mar (am) | 13 Mar (pm) | 19 Mar (am) | 14 Apr (pm) | 9 Apr | ✓ |
| Tax Update - A Deep Dive into the Finance Act 2025 | £83 | 3 | 15 May (pm) | 19 May (pm) | 17 Jun (am) | 10 Jul (pm) | 9 Jun | ✓ |
| Tax Update - What's New for Autumn 2025 | £83 | 3 | 15 Sep (pm) | 29 Sep (pm) | 9 Oct (am) | 16 Oct (pm) | 16 Oct | ✓ |
| Tax Update - Practical and Current Issues for OMBs | £83 | 3 | 14 Nov (am) | 27 Nov (pm) | 2 Dec (am) | 11 Dec (pm) | 10 Dec | ✓ |

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Taxation

| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | ON-DEMAND | |
|--|------------|-----------|---------------------|-------------------|-----------------|
| | | | | 2025 AVAILABILITY | BACK CATALOGUE* |
| Tax Update for Audit and Accounts Staff | £83 | 1 | 23 Jun (am) | - - - | 14 Jul ✓ |
| Festival of CPD - Tax | £199 | 6 | 23 Oct | - - - | |
| BUSINESS | | | | | |
| Business Structures - Tax Issues | £166 | 3 | 28 Oct (pm) | - - - | 17 Nov ✓ |
| Capital Allowances - Key Issues and Updates for 2025 | £83 | 3 | 28 May (pm) | 13 Nov (pm) - - | 16 Jun 1 Dec ✓ |
| Cash Basis Explained | £83 | 1 | 6 Mar (am) | - - - | 24 Mar ✓ |
| Construction Industry Tax - An Update | £166 | 3 | - | - - - | 30 Jun ✓ |
| IR35 - The Definitive Guide | £125 | 2 | 27 Feb (pm) | - - - | 17 Mar ✓ |
| MTD - What you Need to Know in 2025 | £83 | 1 | 14 Jul (pm) | - - - | 28 Jul |
| Partnerships - Tax Planning and Tips | £166 | 3 | 6 Nov (am) | - - - | 24 Nov ✓ |
| Tax Succession Planning for the Family Business | £166 | 3 | 21 Oct (pm) | - - - | 10 Nov ✓ |
| The Effective Use of Business Tax Losses | £166 | 3 | 17 Nov (pm) | - - - | 1 Dec ✓ |
| Unincorporated Businesses - Tax Issues and Planning | £166 | 3 | 24 Nov (pm) | - - - | 8 Dec ✓ |
| CORPORATE | | | | | |
| Company Tax Computations - What to Look Out For | £83 | 3 | 18 Sep (am) | - - - | 6 Oct ✓ |

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Taxation

| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | ON-DEMAND | |
|--|------------|-----------|---------------------|-------------------|-----------------|
| | | | | 2025 AVAILABILITY | BACK CATALOGUE* |
| Company Tax Losses - Getting it Right | £83 | 2 | 23 Sep (am) | - | 13 Oct ✓ |
| Corporation Tax - Six Monthly Update [Spring] | £166 | 2 | 11 Mar (am) | - | 31 Mar ✓ |
| Corporation Tax - Six Monthly Update [Autumn] | £166 | 2 | 21 Oct (am) | - | 10 Nov ✓ |
| Group Reconstructions - Tax Implications | £166 | 3 | 25 Nov (am) | - | 15 Dec ✓ |
| Research and Development - The Definitive Guide | £83 | 1.5 | 3 Mar (pm) | - | 17 Mar ✓ |
| PERSONAL AND EMPLOYMENT | | | | | |
| Completing Tax Returns for Individuals - Practical Issues and New Developments | £83 | 3 | - | - | 7 Apr ✓ |
| Employment Taxes - Essential Update for 2025 | £83 | 3 | 14 Mar (am) | 21 Mar (am) | 7 Apr ✓ |
| Non UK Domiciles - The New Tax Rules | £83 | 1.5 | 20 Feb (am) | - | 10 Mar |
| Payrolling Benefits - What We Know So Far | £83 | 1.5 | 28 Nov (am) | - | 15 Dec |
| Payroll Update for 2025 | £83 | 2 | 19 Mar (am) | - | 7 Apr ✓ |
| Pensions Savings - The Tax Issues | £166 | 3 | 9 Dec (pm) | - | 22 Dec ✓ |
| Personal Tax - What you Need to Know in 2025 | £83 | 1.5 | 26 Feb (pm) | 4 Mar (am) | 16 Apr (pm) |
| Taxation of Benefits and Expenses including P11Ds | £83 | 2 | 21 May (am) | - | 9 Jun ✓ |
| The Tax Aspects of Internationally Mobile Employees | £166 | 2 | 25 Mar (am) | - | 14 Apr |

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Taxation

| | | | | | | | ON-DEMAND | |
|---|------------|-----------|---------------------|-------------|-------------|---|-------------------|-----------------|
| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | 2025 AVAILABILITY | BACK CATALOGUE* |
| LAND AND PROPERTY | | | | | | | | |
| Land Transaction Taxes - Pitfalls and Planning Opportunities | £166 | 3 | 30 Apr (am) | - | - | - | 19 May | ✓ |
| Property Taxes - A Current View | £166 | 3 | 29 Apr (pm) | 13 Nov (am) | - | - | 19 May 1 Dec | ✓ |
| Residential Property - Capital Gains Tax | £83 | 2 | 5 Nov (am) | - | - | - | 24 Nov | ✓ |
| Residential Property - IHT | £83 | 2 | 12 Nov (am) | - | - | - | 1 Dec | ✓ |
| Residential Property - Income Tax | £83 | 2 | 19 Nov (am) | - | - | - | 8 Dec | ✓ |
| ESTATES, IHT, TRUSTS | | | | | | | | |
| Income Tax and CGT - A Guide to Death and Estate Administration | £166 | 2 | 26 Nov (am) | - | - | - | 15 Dec | ✓ |
| Probate and IHT - A Tax Refresher | £166 | 3 | 10 Mar (pm) | - | - | - | 24 Mar | ✓ |
| Trust Planning | £166 | 3 | 21 May (pm) | - | - | - | 9 Jun | ✓ |
| VAT | | | | | | | | |
| VAT Update - What's New for Spring 2025 | £83 | 2 | 24 Apr (am) | 14 May (pm) | 4 Jun (pm) | - | 29 May | ✓ |
| VAT Update - What's New for Autumn 2025 | £83 | 2 | 15 Oct (am) | 21 Oct (am) | 18 Nov (pm) | - | 6 Nov | ✓ |
| VAT - Construction Services | £83 | 1.5 | 14 Oct (am) | - | - | - | 3 Nov | ✓ |

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Taxation

| | | | | | | | ON-DEMAND | |
|---|------------|-----------|---------------------|-------------|---|---|-------------------|-----------------|
| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | | 2025 AVAILABILITY | BACK CATALOGUE* |
| VAT - Cross Border Supplies of Services | £83 | 1.5 | 30 Apr (pm) | - | - | - | 19 May | ✓ |
| VAT - Imports and Exports of Goods | £83 | 1.5 | 6 Nov (pm) | - | - | - | 24 Nov | ✓ |
| VAT - Land and Property Investment and Transactions | £83 | 1.5 | 5 Jun (am) | - | - | - | 23 Jun | ✓ |
| OTHER AREAS | | | | | | | | |
| Acting for Farmers - An Update | £83 | 3 | 11 Jun (pm) | - | - | - | 30 Jun | ✓ |
| Acting for the High Net Wealth Client | £166 | 3 | 19 Nov (pm) | - | - | - | 8 Dec | ✓ |
| Capital Taxes Update and Refresher | £83 | 3 | 2 Apr (am) | 4 Sep (am) | - | - | 21 Apr 22 Sep | |
| ESG - An Introduction to Tax Issues | £83 | 1 | 8 Oct (am) | - | - | - | 27 Oct | |
| Family Tax Planning | £166 | 3 | 17 Apr (am) | 18 Sep (am) | - | - | 5 May 6 Oct | ✓ |
| Share and Business Valuations | £166 | 3 | 24 Jun (pm) | - | - | - | 14 Jul | ✓ |
| Taxation of Couples - CGT | £83 | 1 | 5 Mar (am) | - | - | - | 24 Mar | ✓ |
| Taxation of Couples - IHT | £83 | 1 | 26 Mar (am) | - | - | - | 14 Apr | ✓ |
| Taxation of Couples - Income Tax | £83 | 1 | 28 Feb (am) | - | - | - | 17 Mar | ✓ |
| Trouble with the Taxman | £83 | 3 | 3 Nov (pm) | - | - | - | 17 Nov | ✓ |

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Other Topical Areas

| COURSE | CASH PRICE | CPD HOURS | LIVE STREAMED DATES | | | ON-DEMAND | | |
|--|------------|-----------|---------------------|------------|---|-------------------|------------|-----------------|
| | | | | | | 2025 AVAILABILITY | E-LEARNING | BACK CATALOGUE* |
| Acting for Doctors - An Update | £166 | 3 | 12 Nov (pm) | - | - | 1 Dec | | |
| Company Law Issues | £83 | 2 | - | - | - | 1 Sep | ✓ | ✓ |
| Employment Law Update for Accountants in 2025 | £83 | 1 | 3 June (pm) | - | - | 23 Jun | | ✓ |
| Finance for the Non Finance Professional | £166 | 5 | - | - | - | 1 Sep | ✓ | ✓ |
| Fraud Awareness and Prevention | £83 | 1 | - | - | - | 1 Oct | ✓ | |
| Managing Your Practice - Business Strategy | £83 | 1 | 4 Nov (am) | - | - | 24 Nov | | ✓ |
| Managing Your Practice - Management | £83 | 1 | 10 Nov (am) | - | - | 24 Nov | | ✓ |
| Modern Slavery Act Requirements | £83 | 1 | - | - | - | 1 Oct | ✓ | |
| Money Laundering - Key Issues and Updates for 2025 | £83 | 1.5 | 27 Nov (am) | 9 Dec (am) | - | 22 Dec | | ✓ |
| Practice Assurance - Regulatory Feedback | £83 | 2 | 27 Nov (pm) | - | - | 15 Dec | | ✓ |
| FUTURE READY SKILLS SERIES | | | | | | | | |
| Building a Tech-Enabled Organisation | £83 | 1 | 17 Sep (am) | - | - | 6 Oct | | ✓ |
| Digital Mindset and Skills | £83 | 1 | 24 Sep (am) | - | - | 13 Oct | | ✓ |
| Using and Communicating with Data | £83 | 1 | 10 Sep (am) | - | - | 29 Sep | | ✓ |
| What is AI and What Does it Mean for Accountants | £83 | 1 | 5 Mar (am) | 3 Sep (am) | - | 21 Mar 22 Sep | | ✓ |

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Conferences and Masterclasses



Skills, Management and Leadership

Live Streamed Programme

Our 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. See pages 50 - 51.

In-House

As an alternative, bespoke in-house training for professional, management and leadership skills can be delivered either on your premises or virtually. Each training package is developed with your input so it can be tailored to meet your business needs and goals.



Meet Louise Conner

With 20+ years of experience in Learning and Development, Louise is Mercia's Management and Skills Trainer.

Her motivational coaching delivers exceptional results and equips teams with the skills to reach their potential. Louise's industry expertise and personalised training approach make her training an invaluable asset to teams seeking to enhance their management and leadership abilities.



Online Conferences

Our specialist conference topics look at a wide range of practical and topical issues.

The on-demand version is available to purchase separately. Those who enrol on the live conference will receive this free of charge.



NEW Masterclasses

Our new masterclasses allow you the opportunity to enrol on individual on-demand conference sessions separately.



Residential Conference

Our annual residential conference supports you in networking whilst also gaining 10 CPD hours.

The conference will take place on 18 to 19 September 2025 at the Cambridge Belfry Hotel & Spa.

Discounts are available for CPD Members

For detailed information about our masterclasses, please visit [here](#)

To learn more about our conference programme, click [here](#)



Skills, Management and Leadership Programme

| COURSE | PRICE | CPD HOURS | LIVE STREAMED DATES | |
|--|-------|-----------|---------------------|-------------|
| Coaching Skills | £105 | 2 | 6 Mar (am) | 18 Sep (am) |
| Delegation and Feedback | £105 | 2 | 6 Mar (pm) | 18 Sep (pm) |
| Effective Communication | £105 | 2 | 23 Apr (am) | 24 Sep (am) |
| Emotional Intelligence | £105 | 2 | 23 Apr (pm) | 24 Sep (pm) |
| Forming and Maintaining Client Relationships | £105 | 2 | 29 Apr (am) | 7 Oct (am) |
| Leading a Team | £105 | 2 | 29 Apr (pm) | 7 Oct (pm) |
| Multi-task Management | £105 | 2 | 13 May (am) | 29 Oct (am) |
| People Management | £105 | 2 | 13 May (pm) | 29 Oct (pm) |
| Performance Management | £105 | 2 | 17 Jun (am) | 20 Nov (am) |
| Presenting with Confidence | £105 | 2 | 17 Jun (pm) | 20 Nov (pm) |
| Wellbeing and Resilience in the Workplace | £105 | 2 | 9 Jul (am) | 2 Dec (am) |
| Working and Communicating with Different Personalities | £105 | 2 | 9 Jul (pm) | 2 Dec (pm) |



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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 to the [ICAEW](#) or [CILEX-ACCA](#) and paying the appropriate fee.

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

See below for details of the course and assessment.



Course Dates

Course price: £785

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

| Live Streamed | On-Demand |
|------------------------|---------------------|
| 13-14 and 17-18 March | Recording available |
| 6-7 and 10-11 November | |



Assessment Dates

Assessment price: £240

All assessments run from
9.30am to 11.30am

| Online Assessment |
|-------------------|
| 26 March |
| 2 July |
| 19 November |



Further reading

The [ICAEW](#) and [CILEX-ACCA](#) websites provide 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.



Already accredited?

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

All prices are subject to VAT.



Please call us for more information on
0330 058 7141.

Click [here](#) to book online.



We are more than training at Mercia

Compliance

A helping hand for your practice

Mercia is 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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We are more than training at Mercia

Promote your Practice

Innovative marketing products, just for accountants.

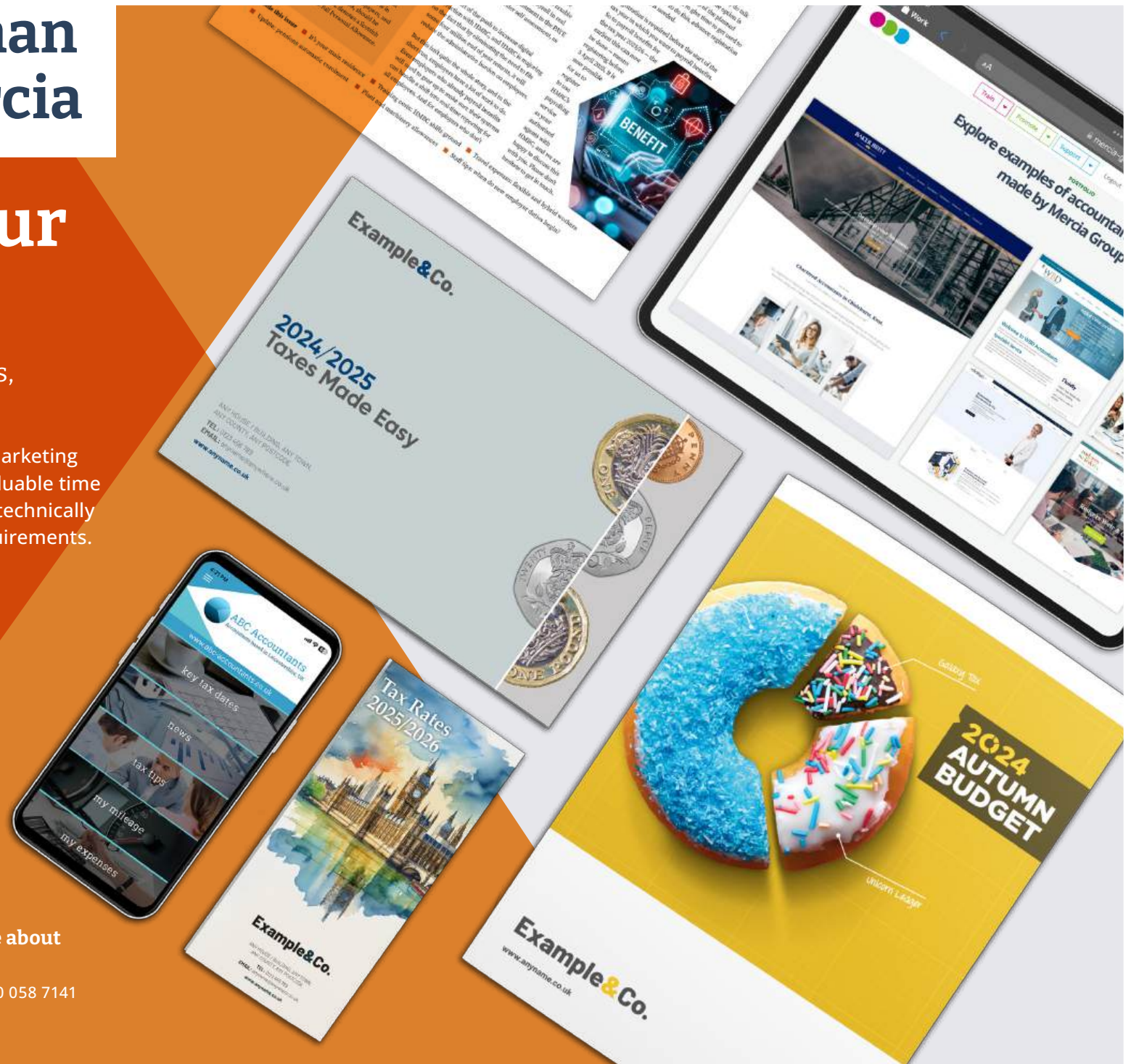
Mercia has developed a wide range of marketing solutions for your firm. Save yourself valuable time and ensure your marketing collateral is technically accurate in a format that suits your requirements.

- Budget Summaries
- Tax Cards
- Newsletters
- Websites
- Digital Marketing Tools
- Tax Articles and Guides



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