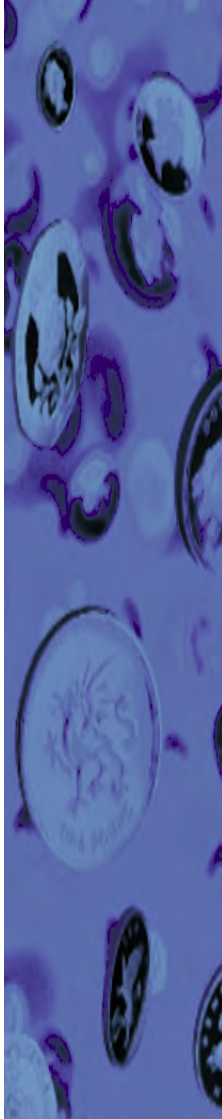


Norfolk Professional Institutes Event Guide 2008/2009

www.npieg.org



The Association of Taxation Technicians



A pdf copy of this booklet and any changes to the events programme are available at:
www.npieg.org



*This booklet is supported by the
Financial Industry Group,
part of the Shaping Norfolk's Future
economic development partnership.*

Contents

	page
■ The Norfolk Professional Institutes Event Guide	1
■ Programme of events	2
■ The Association of Chartered Certified Accountants	15
■ The Institute of Chartered Accountants in England and Wales	16
■ Business Link East	17
■ The Association of Accounting Technicians	18
■ The Chartered Institute of Taxation/ The Association of Taxation Technicians	19
■ The Chartered Insurance Institute	20
■ <i>ifs</i> School of Finance	21
■ The Personal Finance Society	22

The Norfolk Professional Institutes Event Guide

Aimed at financial services, the Norfolk Professional Institutes Event Guide promotes the activities of the following:

- The Association of Chartered Certified Accountants
- The Institute of Chartered Accountants in England and Wales
- Business Link East
- The Association of Accounting Technicians
- The Chartered Institute of Taxation
- The Association of Taxation Technicians
- The Chartered Insurance Institute
- **ifs** *School of Finance*
- The Personal Finance Society

The booklet explains the services provided by each organisation, local contact names and events. The guide is produced by a committee of volunteers. They are:

- David Woodcock FCCA FMAAT MCFI DMS AIMIS (Chairman)
- Tony Meale FCII (Secretary)
- Sarah Carter FCCA
- Marjorie Eade BSc FCIB ACIL
- Steve Bradshaw CTA
- Sue Donmall ACII
- David Martin FIBC
- Tim Howes BSc ACA

Members and students of the organisations represented in this booklet are welcome to attend any of the events listed.

No responsibility can be accepted by the committee producing the booklet for any consequential loss or damage arising from its use or for the speakers and the content of their presentations and handouts.

Whilst every effort is made to ensure that the information contained in this booklet is correct, it is prepared up to one year ahead and may be subject to change.

For updates please see the website www.npieg.org and click on Local Event Updates and Latest News.

Programme of events

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
The Vehicle Systems Information Board, presented by Stephen Coney, Vehicle Systems Information Board	Tuesday 9th September 2008 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Finance Act 2008 - Practical Aspects, presented by Robert Jamieson, Partner in Mercer & Hole, Chartered Accountants	Monday 15th September 2008 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	There is a charge for attendance at meetings and booking forms are sent to all those on our mailing list approximately 4 weeks before the seminar date. Members and non-members are welcome at all branch events. Any changes to this programme will be notified to members by e-mail and on the branch page of the CIOT website. Any queries should be addressed to the Branch Administrator, Stuart Wright who may be contacted on 01842 754166 or by e-mail on wright@79cr.freereserve.co.uk
Retirement Planning - a more realistic approach, presented by Trevor Goodbun, Chartered Financial Planner	Tuesday 16th September 2008 6.00pm to 8.30pm	Institute of Food Research, Norwich Research Park, Colney, Norwich, NR4 7UA	Association of Chartered Certified Accountants	Free entry. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor
Due Diligence, presented by Kirsty McGregor	Thursday 18th September 2008 4.30pm to 7.30pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	£50 inc VAT or £45 inc VAT if booked by Fri 15 August. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Annual Dinner	Friday 26th September 2008 7.15pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Insurance Institute of Norwich	Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Branch Annual Dinner	Friday 3rd October 2008 7.30pm	Sainsbury Centre, University of East Anglia, Norwich, NR4 7TJ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008.
HMRC current issues and an opportunity to discuss	Tuesday 7th October 2008 6.00pm to 8.30pm	The Business, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	Association of Chartered Certified Accountants	Free entry. Date of event may change subject to NCFE fixtures. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
EASCA Networking Lunch with speakers from Hays on 'Personal Effectiveness' In association with IoD Norfolk	Wednesday 8th October 2008 12.15pm to 2.30pm	The Top, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	The Institute of Chartered Accountants in England and Wales	£25 inc VAT. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Insurance and the Media, presented by David Worsfold, Incisive Media	Tuesday 14th October 2008 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Insurance Products and Investments: Taxation and Tax Planning, presented by Matthew Hutton, lecturer and writer	Tuesday 14th October 2008 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
How to get paid for web sales presented by Malcolm Kemp, Paston Chase Ltd	Wednesday 15th October 2008 6.30pm to 7.30pm	Great House training centre, Age Concern Norfolk, 300 St Faith's Road, Old Catton, Norwich NR6 7BJ	The Association of Accounting Technicians	Free entry. Refreshments and buffet will be served. Telephone Jeremy Nottingham on 01263 837710.
Charities Update, presented by Liz Hazel and Kevin Lowe of PricewaterhouseCoopers	Thursday 16th October 2008 4.30pm to 7.30pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	£50 inc VAT or £45 inc VAT if booked by Fri 12 September. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Consolidation in the Life Industry presented by Jonathan Yates Senior Executive, Swiss Re	Tuesday 21st October 2008 6.00pm to 7.00pm	National Skills Academy for Financial Services, St Andrews Street, Norwich NR2 4UH	<i>ifs School of Finance and Financial Industry Group</i>	Places must be reserved in advance at info@fignorfolk.com Check Financial Industry Gazette for latest details.
Compensation Act Reforms, presented by Colin Peck, Weightmans LLP	Tuesday 11th November 2008 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Developing a Successful Website and Online Marketing Strategy, presented by Peter Ballard, Foolproof	Tuesday 11th November 2008 6.00pm to 8.30pm	Institute of Food Research, Norwich Research Park, Colney, Norwich, NR4 7UA	Association of Chartered Certified Accountants	Free entry. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
Tax and the financial implications of making a will presented by Chris King, Clapham and Collinge	Wednesday 19th November 2008 6.30pm to 7.30pm	Great House training centre, Age Concern Norfolk, 300 St Faith's Road, Old Catton, Norwich NR6 7BJ	The Association of Accounting Technicians	Free entry. Refreshments and buffet will be served. Telephone Jeremy Nottingham on 01263 837710.
Risk Management and Corporate Governance, presented by Philip Basham of Amberwing	Thursday 20th November 2008 4.30pm to 7.30pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	£50 inc VAT or £45 inc VAT if booked by Fri 17 October. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Marriage, Separation and Divorce, presented by Paul Soper, lecturer and broadcaster	Tuesday 25th November 2008 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Organised Fraud - It's Not Just Motor, presented by Peter Taylor, Cunningham Lindsey UK Ltd	Tuesday 9th December 2008 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Capital Gains Tax Tips, presented by Jerry Craggs	Tuesday 9th December 2008 6.00pm to 8.30pm	The Business, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	Association of Chartered Certified Accountants	Free entry. Date of event may change subject to NCFE fixtures. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor
Joint Meeting with HMRC	Tuesday 16th December 2008 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
The Credit Crunch, presented by Tim Pike, Bank of England	Tuesday 13th January 2009 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Practical Implications of Companies Act 2006, presented by James Hunter, Partner in Mills and Reeve	Tuesday 20th January 2009 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Tax and Trusts	Tuesday 10th February 2009 9.00am to 1.00pm	Holiday Inn, Ipswich Road, Norwich NR4 6EP	The Personal Finance Society	Free Entry Members and Non-Members www.thepfs.org

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
Topic To Be Confirmed, presented by Andrew Moncrieff, R B Hawkins	Tuesday 10th February 2009 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
PAYE & NI Update, presented by Paul Soper lecturer and broadcaster	Tuesday 10th February 2009 4.30pm to 7.30pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	£50 inc VAT or £45 inc VAT if booked by Fri 19 December 2008. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
PAYE, Benefits and National Insurance; Planning and Compliance, presented by Mark Morton, Mercia Training	Tuesday 17th February 2009 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Accounting Standards Update (Joint event with AAT), presented by Charles Gubbins, Kaplan Financial	Tuesday 24th February 2009 6.00pm to 8.30pm	Institute of Food Research, Norwich Research Park, Colney, Norwich, NR4 7UA	Association of Chartered Certified Accountants	Free entry. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor
Corporate Recovery: Review of Options Available and Case Study, presented by Robin Ashe of Lovewell Blake	Tuesday 10th March 2009 4.30pm to 7.30pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	£50 inc VAT or £45 inc VAT if booked by Fri 13 Feb. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
The Underwriting Cycle, presented by Simon McGinn, Allianz	Tuesday 10th March 2009 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich	Free entry. Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Taxation and the Family Business, presented by Chris Jones, CIOT Council Member	Tuesday 17th March 2009 2.00pm to 5.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Maximising your new qualification and becoming a member in practice, presented by Henry Cooper AAT Council Member and Sara Tilley from the AAT	Wednesday 18th March 2009 6.30pm to 7.30pm	Great House training centre, Age Concern Norfolk, 300 St Faith's Road, Old Catton, Norwich NR6 7BJ	The Association of Accounting Technicians	Free entry. Refreshments and buffet will be served. Telephone Jeremy Nottingham on 01263 837710.

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
Presenting with Impact, presented by Margaret Zuppinger	Tuesday 24th March 2009 6.00pm to 8.30pm	The Business, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	Association of Chartered Certified Accountants	Free entry. Date of event may change subject to NCFE fixtures. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor
Examination Techniques, presented by Kaplan Financial	Wednesday 15th April 2009 6.15pm to 7.30pm	Kaplan Financial, 74 St. Faiths Lane, Norwich, NR1 1NE	Open to all professional institute students	Free entry. Email norwich@kaplan.co.uk
Preparing for payroll year end, presented by Valerie Woodland (preceded by the AGM)	Wednesday 15th April 2009 6.15pm to 7.30pm	Great House training centre, Age Concern Norfolk, 300 St Faith's Road, Old Catton, Norwich NR6 7BJ	The Association of Accounting Technicians	Free entry. Refreshments and buffet will be served. Telephone Jeremy Nottingham on 01263 837710.
Change Management, presented by Brian McPhail, Swiss Re	Tuesday 21st April 2009 12.30pm to 1.30pm	St Andrews House, St Andrews Street, Norwich NR2 4UH	The Insurance Institute of Norwich Free entry.	Tea/Coffee from 12.00 noon. Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Day Conference, presented by Tim Good, PTP Group	Tuesday 21st April 2009 9.00am to 5.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Annual General Meeting	Tuesday 21st April 2009 5.30pm	Marsh Ltd, Queens Road, Norwich NR1 3QQ	The Insurance Institute of Norwich	Telephone Judith Little 07918 138986 www.insuranceinstituteofnorwich.co.uk
Meeting your Obligations as an Employer: Tax, Legal and Accounting, presented by Steeles and Peters Elworthy & Moore	Thursday 23rd April 2009 9.30am to 5.00pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	Whole day inc lunch £90 inc VAT. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Companies Act 2006 and Company Law, presented by Mike Griffiths LLB LL.M ACIARB consultant, lecturer and writer	Tuesday 28th April 2009 6.00pm to 8.30pm	The Business, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	Association of Chartered Certified Accountants	Free entry. Date of event may change subject to NCFE fixtures. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor

<i>Event</i>	<i>Date Start/End time</i>	<i>Location</i>	<i>Organising Institute</i>	<i>Cost, contact and further information</i>
Annual Tax Seminar, presented by Marion Hodgkiss of Kaplan Financial	Wednesday 6th May 2009 9.30am to 5.00pm	University of East Anglia Sportspark, Earlham Road, Norwich NR4 7TJ	The Institute of Chartered Accountants in England and Wales	Whole day inc lunch £90 inc VAT. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
Budget and Tax Changes	Thursday 7th May 2009 9.00am to 1.00pm	Holiday Inn, Ipswich Road, Norwich NR4 6EP	The Personal Finance Society	Free Entry Members and Non-Members www.thepfs.org
ACCA Spring Ball	Friday 8th May 2009 7.15pm	Sunningdale Suite, De Vere Dunston Hall, Ipswich Road, Norwich, NR14 8PQ	Association of Chartered Certified Accountants	Invitations and booking forms will be circulated early 2009.
Budget Update (Joint event with ACCA), presented by Roger Jones, Larking Gowen	Tuesday 12th May 2009 6.00pm to 8.30pm	Professional Development Centre, Woodside Road, Norwich NR7 9QL	The Association of Accounting Technicians	Free entry. Refreshments and buffet will be served. Telephone Jeremy Nottingham on 01263 837710.
EASCA Annual Dinner	Friday 15th May 2009 from 7.00pm	Stoke by Nayland Club Keepers Lane Leavenheath Colchester CO6 4PZ	The Institute of Chartered Accountants in England and Wales	Price to be confirmed. Please contact Margaret Jackson or Michelle May-Jones on 01284 774730 or email eastangliansca@icaew.com
IHT Refresher - including IHT calculations for Trusts, Joint meeting with STEP, presented by Pat Nown, Mercia Training	Tuesday 19th May 2009 4.00pm to 7.00pm	De Vere Dunston Hall, Ipswich Road, Norwich NR14 8PQ	The Chartered Institute of Taxation	Please see cost, contact and further information details for Monday 15th September 2008 on page 3.
Hiring Staff - the complete process, presented by Pure Resourcing Solutions	Tuesday 30th June 2009 6.00pm to 8.30pm	The Business, Norwich City Football Club, Carrow Road, Norwich NR1 1JE	Association of Chartered Certified Accountants	Free entry. Date of event may change subject to NCFE fixtures. Email: bookings.london@uk.accaglobal.com or visit www.uk.accaglobal.com/nor

The Association of Chartered Certified Accountants

(Norwich Members' Network)



About ACCA

- ACCA (the Association of Chartered Certified Accountants) is the global body for professional accountants. We aim to offer business-relevant, first-choice qualifications to people of application, ability and ambition around the world who seek a rewarding career in accountancy, finance and management.

We support our 122,000 members and 325,000 students throughout their careers, providing services through a network of 80 offices and centres. Our global infrastructure means that exams and support are delivered – and reputation and influence developed – at a local level, directly benefiting stakeholders wherever they are based, or plan to move to, in pursuit of new career opportunities.

Mission statement

- To provide opportunity and access to people of ability around the world and to support our members throughout their careers in accounting, business and finance.
- To achieve and promote the highest professional, ethical and governance standards.
- To advance the public interest and to be a global leader in the profession.

Membership

- Membership is open to those who have completed the professional exams and can meet the professional training requirements.

The Norwich Members' Network

- Norwich Members' Network has approximately 1,000 members, affiliates and students living in the region and organises educational events on topical subjects as well as a programme of presentations that enables members to keep up to date with professional and business matters.
- For information on the Network and lectures please visit www.uk.accaglobal.com/nor

How to contact us

If you would like to know more about the Norwich Members' Network please contact:

Keith Shorten FCCA email: kbs@lovewell-blake.co.uk
Tel: 01603 663300

The Institute of Chartered Accountants in England & Wales

(Norfolk & Norwich Society)



Mission statement To work in the public interest to enhance the reputation of the accounting profession.

To maintain the public standing of members in all sectors of the economy.

To achieve the above through a continuing commitment to the highest standards of professional learning and development encompassing:

- technical excellence.
- professional conduct.
- representation and support.

Membership Qualifying as a Chartered Accountant requires individuals to pass rigorous professional exams, while also completing a demanding training contract. The majority of members work either in practice, or in industry, across a wide variety of industry sectors.

The local institute The Norfolk & Norwich Society of Chartered Accountants is a branch of the East Anglian Society of Chartered Accountants which has a membership of over 3,500. Its objectives are:

- To provide a focal point of contact and support for members.
- To facilitate a range of courses, seminars, presentations and other relevant focused activities for members locally.
- To provide local representation of the Institute and maintain contact with other professional and civic bodies.
- To respond to Institute discussion documents on behalf of local members.

How to contact us If you would like to know more about the Institute of Chartered Accountants please contact:

Margaret Jackson or Michelle May-Jones

Tel: 01284 774730
email: eastangliansca@icaew.com

Business Link East



Mission statement

- Business Link is a government funded service designed to promote enterprise.
- Help, support and advice is available to those growing a business or just starting out.
- Business Link works closely with partners and intermediaries to encourage and develop enterprise, and so benefit the local economy.
- All our support is independent and impartial, and most services are provided free of charge.

Information, Diagnostics and Brokerage Business Link operates a model of support summarised as information, diagnosis and brokerage. We have established a new online database which is exclusively for private sector consultants including lawyers and accountants and providers of IT support services. Clients in need of services are referred to those listed on the supplier brokerage service.

Services Business Link is the gateway to business support;

- Free one-to-one business advice with an experienced business adviser
- Answers to business questions through our Information and Intelligence Centre
- Workshops and seminars covering a vast range of business topics.

How to contact us If you would like to know more about Business Link East please contact

Tel: 08457 171615
email: info@businesslinkeast.org.uk
website: www.businesslink.gov.uk/east

Mission statement ■ Our vision is to be a strong, visible and respected body for accounting technicians; to offer internationally recognised membership and qualifications, which are valued by the public, employers and the business world.

Membership Accounting Technicians work in accounting and finance alongside chartered accountants in industry and commerce, accountancy practices and in the public and voluntary sectors. Some are self-employed offering accountancy services to the general public.

To become a full member of the AAT, students are required to demonstrate:

- Proven competence at NVQ/SVQ Levels 3 and 4 in Accounting.
- One year's full-time work experience (or the equivalent part-time).
- Evidence of suitability for full membership and commitment to the AAT.

The local branch The objective of the AAT's Norfolk Branch is to provide relevant, high quality, accessible and affordable CPD opportunities for local fellow, full, affiliate and student members.

How to contact us If you would like to know more about the AAT and/or the AAT Norfolk Branch please contact the following:

Jeremy Nottingham FMAAT
Chairman

Tel: 01263 837710
email: jn@paston.co.uk

David Woodcock FMAAT
Publicity Officer

Tel: 01603 785204
email: david.woodcock@acnorfolk.org.uk

website: www.aat.org.uk/norfolk

Mission statement ■ To promote the aims and interests of The Chartered Institute of Taxation (CIOT), and the Association of Taxation Technicians (ATT), and the members of both bodies.

■ To advance education in, and to promote the study of, the administration and practice of tax.

Membership Membership of the East Anglia Branch is open to:

■ Members of the Chartered Institute of Taxation or Association of Taxation Technicians who live or work in East Anglia.

Services ■ To help members, students and other attendees fulfil their requirement for Continuing Professional Development (CPD).

■ To act as a link between members and the CIOT/ATT.

■ As part of its charitable activities, the CIOT also sponsors the Low Incomes Tax Reform Group which works to improve and simplify the tax system so as to make it more responsive to the needs of those who cannot afford to pay for tax advice.

How to contact us If you would like to know more about the Chartered Institute of Taxation or the Association of Taxation Technicians please contact:

Kevin Bunting
Branch Secretary
Lovewell Blake
102 Prince of Wales Road
Norwich NR1 1NY

Tel: 01603 663300
email: kpb@lovewell-blake.co.uk

The Chartered Insurance Institute

(Insurance Institute of Norwich)



Mission statement

- To promote efficiency and improvement in the practice of insurance amongst both members and non-members.
- To make the conduct of insurance business more effective and professional.
- To encourage confidence in those people working in the insurance industry through reliable testing.
- To promote and assist the study of any subjects relating to a branch of insurance.
- To collect and form a body of expert opinion on the law and practice relating to all things connected with insurance.
- To supervise and control the professional standards of members and to promote their interests, welfare and advancement.
- To provide information and advice about employment in insurance.
- To help members and their dependants in times of financial hardship.

Membership

Membership of the Association is open to:

- Members of the Chartered Insurance Institute who live or work in the area.
- Other members of the Chartered Insurance Institute at the discretion of the council.

The local institute

- The Institute of Norwich represents all those living and working in Norfolk.

Services

- Membership is about 1700 people which includes Personal Finance Society members. Our members work in a wide variety of industry sectors.
- To organise educational, charitable, social and sporting activities.

How to contact us

If you would like to know more about the Insurance Institute of Norwich please contact:

Judith Little
Secretary

Tel: 07918 138986 email: judith@fitzgeraldconsulting.co.uk
website: www.insuranceinstituteofnorwich.co.uk

Derek Cousins Tel: 01603 207464
Assistant Secretary email: norwich.institute@virgin.net
Marsh Ltd, Queens Road,
Norwich NR1 3QQ

ifs School of Finance

(Norwich & East Anglia)



Mission statement

- The **ifs** School of Finance is a leading provider of financial education. As a school of finance we provide for the formal learning needs of consumers and those employed within the industry, both in the UK and in key markets worldwide.

Membership

- Members of the **ifs** School of Finance or students of the institute paying professional support fees.

The Norwich Centre

- The Norwich Centre represents members living and working in Norfolk and has been in existence since 1924.
- The centre now forms the hub of the Norwich and East Anglia Regional Network – one of 10 such networks around the UK.
- Membership of the network now numbers over 1700.

Services

- To run high quality educational events for members, customers and potential customers.
- To provide purposeful networking opportunities.
- To promote the **ifs** products, services and values.
- To provide links to other educational opportunities provided by other organisations.
- Events are generally free, and are open to both members and non-members alike.

How to contact us

If you would like to know more about the **ifs** School of Finance please contact the Regional President

Marjorie Eade BSc, FCIB, ACIL

Tel: 01603 773722
email: info@fignorfolk.com
website: www.ifslearning.com

The Personal Finance Society

(Norfolk Region)



-
- Mission statement**
- To form a professional association for all those who give and support personal financial advice.
 - To represent the views of financial advisers from every industry sector.
 - To expand the knowledge, skills and effectiveness of financial advisers and promote professional qualifications so as to increase their competence, standing and success.
 - To foster the business and personal development of financial advisers.

-
- Membership**
- Membership of the Society is open to:
- Anyone in the Financial Services industry who lives or works in the area.

-
- The local society**
- In Norfolk the Personal Finance Society represents all those involved in Financial Services. We currently have over 400 members, working in a wide variety of industry sectors.

-
- Services**
- Regional meetings – Include Business Development, Regulatory up-date, Specialist Technical sessions
 - Annual Conference – contact Mary Peake 0845 166 8429
 - Technical Seminars – include AFPC revision days.
 - AFPC Study Groups – Led by AFPC qualified facilitators.
 - Monthly Magazine – Financial Solutions.
 - The Personal Finance Society Website – www.thepfs.org

How to contact us If you would like to know more about the Personal Finance Society please contact:

David Hickman
Tel: 01508 492818
email: djh@poringlandic.co.uk

Ms S Arden
Personal Finance Society
20, Aldermanbury
LONDON
EC2V 7HY

Tel: 020 8530 0852
Fax: 020 8530 3052

