

COFA Course: Changes to SRA Accounts Rules & Guidance for COFA's



Course Outline

This course examines the duties and responsibilities of the Compliance Officer for Finance and Administration (COFA) and is aimed at Practice Managers and Managing Partners. This training will help to ensure that the COFA you appoint will be able to fulfill their duties.

The course will also cover the recent changes to SAR Accounts rules to ensure your firm complies with the regulations set out by the SRA which was published and came into effect on 6 October 2011.

Course Content

- The SRA guide to the COFA
- SRA information and reporting requirements
- Authorisation Rules
- Duties of COFA
- SRA Accounts Rules
- Potential Liability for the COFA
- Practical Examples

Course Tutors



Huw Palin, Director ACA

Huw qualified as a chartered accountant in 1989 and joined the firm as a senior manager in 1999. Huw is experienced in dealing with all accounting requirements for the legal sector including management accounts, tax planning and SRA accountant's reports. He has experience and involvement on advising legal practices and individuals on financial and business planning issues and has assisted many firms to expand their operations and improve their business processes. Huw also specialises in goodwill valuations for legal firms.



Dawn Bevan, Senior Manager FCCA

Dawn qualified as a Chartered Certified Accountant in 1991 and has been working with legal practices of all sizes for over 20 years. She has acted for the majority of legal firms in Bridgend and is now actively working for firms across South Wales. Dawn's work involves keeping up to date with solicitor's accounts rules and preparation of management accounts to help lawyers monitor and maximise profit..

Want to book?

Complete the 'Booking Form' overleaf or email: book@cpm21.co.uk



BPU Chartered Accountants Course: Changes to SRA Accounts Rules & Guidance for COFA's

Course Booking Form

Please reserve

place(s) on the above course

BPU Chartered Accountants Course

on _____ (date)

at _____ (location).

Course Code: BPU1

CPD Course Booking Terms & Conditions:

1. Course fees must be paid on or before the date of the course. If you fail to attend after booking the course then you remain liable for the fee subject to clause 7 below.
2. Confirmation of booking and details of venue will be sent by email only to the email address provided.
3. A receipted VAT invoice will normally be issued to the delegate/organisation within 14 days of the conclusion of the course
4. Course documentation will be distributed at the event
5. Prices may be subject to change and may vary depending on location of the course (to allow for varying venue costs etc.)
6. We are an SRA approved external CPD course provider and provide CPD hours for those subject to that scheme. It is a condition of the allocation of hours that you attend for the duration of the course and personally complete and sign the CPD register to confirm that you have done so. The relevant CPD reference will be provided by the tutor on the day and will be shown on the CPD register. You should make a note of this and the hours awarded for your own CPD records.
7. We reserve the right to vary, cancel or postpone a course at short notice where necessary. Cpm21 accept no liability if the course does not take place. Refunds will be made as appropriate if the course is cancelled by us.
8. You may cancel/postpone your attendance up to 14 days before the event provided you email such confirmation to support@cpm21.co.uk. We cannot accept telephone, letter or faxed cancellations.
9. You may send a substitute delegate without notifying us in advance but the change must be made clear on the signed CPD register.
10. Data Protection – we may periodically contact you with updates, information and details of courses and services. If you do not wish to receive such updates or information then please email support@cpm21.co.uk
11. The presentations, materials and notes for our courses are prepared solely for the benefit of the delegates attending that course. They are intended to be an integral part of the course presentation and do not necessarily stand on their own outside that context. They must not be used for giving advice in a specific situation. Neither cpm21 nor any of its consultants or tutors shall have any responsibility or liability for losses (including consequential loss) occurring because a person acts upon or fails to act based on any statement made by the consultant or tutor or contained in the course materials, notes or presentations. Our tutors are not authorised to provide practice management, legal or other advice relating to any specific situation or issue as part of our training courses and you should seek appropriate professional, financial or legal advice before making any decisions or taking any actions based on what you have heard, learned or read about on the course.

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Business Name

Contact Name

Contact email

Contact telephone

Special requirements

Course Cost

£

See website listing for current cost

Cheques should be made payable to **CPM21 Ltd**, and sent with this booking form to:

CPM21
The GTi Suite,
Venture House,
Navigation Park.
Abercynon CF45 4SN

Email book@cpm21.co.uk www.cpm21.co.uk

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