



Accounting  
Technicians  
Ireland

# CPD PROGRAMME 2021



# WELCOME

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We would like to welcome you to Accounting Technicians Ireland CPD Prospectus 2021.

We would firstly like to thank you for your continued support throughout 2020. It was a year like no other and brought about many challenges to all our personal and professional lives. The Covid 19 pandemic has challenged us to become more creative and more versatile and we have adapted to changes within the home and workplace. We have had to embrace new technologies and new ways of working and living.

We launched our CPD programme virtually in May 2020 and we will continue this trend throughout 2021. As part of your 2021 member benefit package, we are delivering regular free webinars presented by leading industry experts and a programme of highly relevant CPD eLearning available on demand 24/7 in your Member's Area via Touchpoint.

This year's programme offers ample opportunities to acquire useful Professional and Personal skills. Our CPD content covers everything from Professional Development technical refresh & advancements programmes, through to ethics and regulatory updates, through to technology trends as well as a new suite of Personal Development.

ATI's new Strategy 2024, 'Shaping and Responding to the Environment' will begin its roll-out this year. We are committed to partnering with others to deliver a significant reskilling agenda over the coming four years which will meet both current and future skills needs of enterprise and public sector, thereby enhancing both the brand and the value add of the next Gen Accounting Technician.

We look forward to supporting all your professional and personal development needs this year online so that you can stay safe and well.

## MEMBER EXPERIENCE TEAM

### HERE'S A LOOK AT WHAT'S HAPPENING IN 2021:

July	ATI's 1st Virtual Tech Conference
September	New Syllabus Refresher Modules
	New Financial Data Management Programme
	New Digital Literacy Programme
November	Annual Virtual Conference

We live in a rapidly changing world where legislative, social and economic developments directly affect the environment in which Accounting Technicians live and work, and where technological advances provide radically different ways of working. Accounting Technicians Ireland's (ATI) CPD policy and course provision provides a means whereby our members can keep abreast of these changes, be more effective in work and future proof their career.

## THIS MANDATORY CPD PROGRAMME APPLIES FROM 1 JANUARY 2021.

Meeting your annual CPD requirements is necessary to ensure maintenance of your professional competence and designation status. All of your CPD activity should maintain professional knowledge and skills at the level required to ensure that clients and employers receive competent accounting technician professional service.

- Complete 15 hours of ATI approved CPD per calendar year.
- This must include 1 hour of ethics
- Actively participate in ATI's CPD scheme

## LEARNING OUTCOMES

Completion of a CPD topic should correspond to at least one of the listed learning outcomes.

1. Demonstrate awareness of the dynamic nature of the role of an Accounting Technician in the modern work environment and an understanding of the significance of continuing professional and personal development.
2. Explain and apply technical and regulatory changes and updates as they may apply to any of financial accounting, management accounting, taxation, business law, business management, and the general economic and business environment.
3. Understand and apply developments in software applications and information technologies generally as they may affect the work and skills of a member of ATI.
4. Demonstrate awareness of the evolving professional and ethical environments in which members of ATI typically work.
5. Understand the significance of personal development and how personal development complements the functional aspects of a member's professional development.
6. Reflect on own personal development achievements and future personal development needs in the context of life goals and work commitments.



# PROFESSIONAL DEVELOPMENT

The objective of professional development is to improve knowledge, understanding, skills and competencies, such that an individual is effective and efficient in a workplace environment.

For ATI members, the focus of professional development includes the following:

- Specialist knowledge of overarching principles, concepts and frameworks as they relate to accounting, taxation, business management and business law.
- Appropriate application of methods, techniques and analytical tools as they would be expected of members in relation to accounting, taxation, business management and business law.
- Ability to contribute and participate in the development and evaluation of business information systems with which members would typically work.
- Ability to interpret financial and non-financial data and to communicate effectively with stakeholders in the immediate and broader work environment.
- Understanding of what it means to work as a subject matter expert in a 'professional' work environment and an awareness of the ethical framework within which members undertake professional roles and responsibilities.
- In short, professional development ensures that members acquire and maintain the functional expertise required to carry out an occupational role successfully.



# ETHICS & REGULATORY



## JOHN MCCARTHY JOHN MCCARTHY CONSULTING

What is money-laundering - Best practice identification processes for customers and clients. Reporting suspicions, a practical approach.



## DR. PATRICIA BARKER "THEY DIDN'T BREAK THE RULES. BUT, IT WAS JUST WRONG!"

The tone at the top: How ethics fits with organisational culture. The echo from the bottom: When your personal ethics don't match. Some context in these days of COVID-19.



## JOHN MCCARTHY JOHN MCCARTHY CONSULTING

Learn about new notification requirements and enhanced data subject rights. The principles of GDPR.



## AILEEN MORRISSEY FINANCIAL WELLBEING COACH, BANK OF IRELAND

Climate Change: How Ireland fares. 4 Areas to consider (Food, Plastic, Air, Energy) The Impact begins at home.



## LYNN SIMPSON TRAINING MANAGER, THE WHEEL

The Charities Regulator published its Charities Governance Code in late 2018. All charities must report on their compliance with the Code from 2021 onwards.



## JOE HOUGHTON HOUGHTON CONSULTING

Why risk management can protect your people, projects and plans. Prioritising risks within your profession.



# TECHNICAL REFRESH & ADVANCEMENTS



## **RALPH SMITH** **DO MY BOOKS**

Understand the impact of Brexit on Irish VAT and how to account for the new changes (Postponed Accounting). A refresh of managing the VAT rate change due on 1st of March 2021.



## **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH,** **BANK OF IRELAND**

Understand the benefits of a documented budget. Walk through the budgeting process. Overview of your payslip, the 50/30/20 rule.



## **CIARAN DOHERTY** **IPASS**

This presentation is designed for those who are responsible for the Payroll, Finance or Human Resource functions in their organisation. It will outline the main areas in relation to Termination Payments and the Redundancy Payments Acts.



## **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH, BANK** **OF IRELAND**

The Essential ingredients to good FWB. BOI will present on the current stats and FWB vulnerabilities out there along with the global pillars to secure FWB.



## **RALPH SMITH** **DO MY BOOKS**

What is a financial model, excel tips for fin modelling, best practices, simple gross margin financial model, income statement financial model work through.



## **MARK BRENNAN** **SENIOR MANAGER, PWC**

Overview of the rules of preferential origin with an emphasis on Brexit and the EU- UK Trade and Cooperation Agreement. The General Principles of Customs and cross border trade including customs declaration requirements and incoterms Managing the payment of customs duties and import VAT.



## **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH, BANK** **OF IRELAND**

Your Credit Profile. Spending Triggers, Jargon Buster, the types of borrowing out there.



## **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH, BANK** **OF IRELAND**

How to save successfully. Saving success and budgeting (50/30/20) The types of savings out there.



## **RALPH SMITH** **DO MY BOOKS**

How to review your current accounts payable process, improving the flow of data/doc in the accounts payable process, understanding OCR/AI and how to take advantage of the current tools to collect and extract data, automation of accounts payable processes.



### **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH, BANK OF IRELAND**

Money facts of life. The why and what of pensions, considerations for retirement, post retirement income options.



### **RALPH SMITH** **DO MY BOOKS**

The impact of Covid-19 on financial statements, introduction to basic financial instruments, investment property, business combinations and goodwill.



### **RALPH SMITH** **DO MY BOOKS**

Upgrading the technicians role from bookkeeper to advisor, choosing the correct metrics, performance metrics best practice, extracting KPIs and performance metrics from monthly accounts, KPI's and decision-making.



### **AILEEN MORRISSEY** **FINANCIAL WELLBEING COACH, BANK OF IRELAND**

Budgeting, managing your money, Planning for the future, Legal Protections - Wills, GPAs and EPAs.



### **LOUISE GORMAN** **BALANCED BUSINESS SOLUTIONS**

Identifying bad and doubtful debts including write offs and provisions, how to recover bad debts. Analysing aged debt.



### **JOE HOUGHTON** **HOUGHTON CONSULTING**

Identifying the key steps to setting a project up for success. Putting the project plan into action, measuring progress and performance.

## **TECHNOLOGY TRENDS**



### **PAT MORAN** **PARTNER, PWC IRELAND**

Now more than ever, organisations are being tested around resilience, crisis management, fraud, and cybersecurity. Learn to manage the risk of unexpected disruptions.



### **KIERAN O'BRIEN** **PARTNER, KPMG**

Emerging Technologies and the changes within the finance landscape. An agile approach through Strategy and Value Management. Cross sector business disruptions.



### **LIAM MCKENNA** **PARTNER, MAZARS**

Improve your organisations efficiency and resilience through the implementation of better processes and technology. Robotic process automation has expanded the tools organisations have for improvement.



# PERSONAL DEVELOPMENT

For ATI members personal development goes beyond functional competencies in accounting, taxation, business management and business law. Whereas personal development is often a feature of success in a work environment, it is equally applicable to the challenges in life in general i.e. in and out of the workplace.



## **BRIAN CROOKE** **WORKPLACE WELLBEING IRELAND**

The importance of wellbeing in the workplace. Leading by Example through the 5 Ways to Wellbeing.



## **NIAMH NI DHONAILL** **EXECUTIVE COACH, ADAPTAS**

Developing Awareness, Skills and Competencies that Influence Success in coping with challenging demands, pressures and stress.



## **AIMEE-LOUISE CARTON** **KEEPPAPPY**

An Introduction to Goal Setting: Common mistakes we make, achieving the short and long term goals through best practices. Climbing Everest.



## **DR. CELINE MULLINS** **CEO, ADAPTAS**

Identify your USP to make an impact in your role and to achieve business outcomes.



## **JOSEPH QUINN** **EXECUTIVE COACH, ADAPTAS**

Proactively leading yourself, your team and your clients/stakeholders from Objectives to Results.



## **ANNIKA MCGIVERN** **PSYCHOLOGY CONSULTANT, ADAPTAS**

Finding a balance between Performance & Wellbeing. How the Three Pillars of Wellbeing relate to performance and motivation, and how to optimise our approach for performance and wellbeing.





# E-LEARNING

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## CPD BITES

In partnership with Nelson Croom there are over 48 new CPD bites (15 mins each) accessible via your mobile or laptop. These weekly sessions will keep you up to date with tax, accounting and other regulatory changes, as well as focussing on the skills you need to succeed in the changing world of the accountant.

Here is a taster of the topics your CPD Bites will cover this year:

### TAX

Brexit  
Corporation tax - payment and filing obligations  
Finance Act 2020  
Relevant contracts tax  
Revenue audits

### FINANCIAL AND NON-FINANCIAL REPORTING

Accounting for Coronavirus  
IFRS updates  
Irish GAAP updates  
Integrated reporting / sustainability reporting

### TECHNICAL SKILLS

Anti-money laundering  
Audit  
Post-pandemic finance

### TECHNOLOGY

Digital transformation  
Excel updates  
Project management

### PROFESSIONAL SKILLS

Communication  
Creativity  
Managing conflict  
Problem solving  
Ethics

## NEW 1 HOUR COURSES IN 2021

Corporate Resilience and Business Recovery  
Remote Working: Delivering Results Wherever You Are  
Digital Transformation of Processes, Products and Services  
2020-21 Update in Excel

Please ensure that you have registered by logging into your member portal, launching MyCPD and selecting 'Online Accounting CPD and Bites' provided by [accountingcpd.net](http://accountingcpd.net).

# CPD LUNCH-TIME SERIES

DATE	Time	TITLE	PRESENTER	COMPANY	STREAM
03/03/2021	1pm - 2pm	VAT Issues 2021	Ralph Smith	Do My Books	Technical Refresh and Advancements
10/03/2021	1pm - 2pm	Budgeting Better	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
24/03/2021	1pm - 2pm	Managing Teams Virtually	Annika McGivern	Adaptas	Personal Development
31/03/2021	1pm - 2pm	Financial Wellbeing	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
07/04/2021	1pm - 2pm	Managing your Sales Ledger	Louise Gorman	BBSNI	Technical Refresh and Advancements
14/04/2021	1pm - 2pm	Cyber Security	Pat Moran	Pwc	Technology Trends
21/04/2021	1pm - 2pm	Financial Modelling	Ralph Smith	Do My Books	Technical Refresh and Advancements
28/04/2021	1pm - 2pm	Project Management	Joe Houghton	Houghton Consulting	Technical Refresh and Advancements
12/05/2021	1pm - 2pm	Going Green for FWB	Aileen Morrissey	Bank of Ireland	Ethics and Regulatory
19/05/2021	1pm - 2pm	Fundamentals of Global Trade & Customs	Mark Brennan	Pwc	Technical Refresh and Advancements
26/05/2021	1pm - 2pm	Emotional Intelligence and Contagion	Niamh Ni Dhonaill	Adaptas	Personal Development
09/06/2021	1pm - 2pm	Borrowing Better	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
23/06/2021	1pm - 2pm	Professional Ethics	Prof. Patricia Barker		Ethics and Regulatory
30/06/2021	1pm - 2pm	Data Protection	John McCarthy	John McCarthy Consulting	Ethics and Regulatory
07/07/2021	1pm - 2pm	Workplace Wellness	Brian Crooke	Workplace Wellbeing Ireland	Personal Development
14/07/2021	1pm - 2pm	Saving Sensibly	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
21/07/2021	1pm - 2pm	Practical Accounts Payable	Ralph Smith	Do My Books	Technical Refresh and Advancements
04/08/2021	1pm - 2pm	Goal Setting	Aimee Louise Carton	Keepappy	Personal Development
11/08/2021	1pm - 2pm	Personal Branding and Networking	Celine Mullins	Adaptas	Personal Development
18/08/2021	1pm - 2pm	The Future of Finance	Kieran O'Brien	KPMG	Technology Trends
25/08/2021	1pm - 2pm	Pensions 101	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
15/09/2021	1pm - 2pm	Redundancy and Termination payments	Ciaran Doherty	IPASS	Technical Refresh and Advancements
22/09/2021	1pm - 2pm	Anti-Money Laundering for Accountants	John McCarthy	John McCarthy Consulting	Ethics and Regulatory
29/09/2021	1pm - 2pm	FRS 102	Ralph Smith	Do My Books	Technical Refresh and Advancements
06/10/2021	1pm - 2pm	RPA Automation	Liam McKenna	Mazars	Technology Trends
13/10/2021	1pm - 2pm	Legal Protections	Aileen Morrissey	Bank of Ireland	Technical Refresh and Advancements
20/10/2021	1pm - 2pm	Strategic Thinking	Joseph Quinn	Adaptas	Personal Development
03/11/2021	1pm - 2pm	Governance Code	Lynn Simpson	The Wheel	Ethics and Regulatory
17/11/2021	1pm - 2pm	Performance Metrics/KPIs	Ralph Smith	Do My Books	Technical Refresh and Advancements
24/11/2021	1pm - 2pm	Risk Management	Joe Houghton	Houghton Consulting	Ethics and Regulatory





## CPD PROVIDERS 2021





[CPD@accountingtechniciansireland.ie](mailto:CPD@accountingtechniciansireland.ie)

## JOIN THE CONVERSATION

 Accounting Technicians Ireland

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