

AFM Tax training day

7th June 2022

Timings	Content	Speakers
09:00 – 9:30	Registration	
09:30 – 09:35	Welcome and introduction	Elaine Fairless Chair of AFM Tax Committee
09:35 – 10:15	Quiz	Graham Wilson Morrison Govan
10:15 – 10:55	Corporation tax update <ul style="list-style-type: none"> • General update, change of rate • Super deductions • Changes to R&D and how to claim 	Paul Stone Associate Director Gareth Newport Director Deloitte
10:55 - 11:30	VAT back to basics and IPT <ul style="list-style-type: none"> • Exempt vs standard rated etc • Reverse charge • Partial exemption method discussions and process/current delays 	Jyoti Hirani Insurance VAT Senior Manager PwC
11:30 – 11:45	<i>Coffee Break</i>	
11:45 – 12:30	Tax risk governance <ul style="list-style-type: none"> • Business risk review update • Corporate criminal offence of failure to prevent facilitation of tax evasion • Tax and ESG 	Martin Callaghan Director BDO
12:30– 12:50	Tax and ESG – a Head of Tax view	Anne Murphy Head of Asset Management Tax, Royal London Philip Geddes Head of Tax, LV=
12:50 – 13:35	<i>Lunch</i>	
13:35 - 13:45	AFM Update <ul style="list-style-type: none"> • An update on key AFM issues and discussions 	Martin Shaw, CEO and Elaine Fairless
13.45 – 14:05	HMRC session <ul style="list-style-type: none"> • General update 	Hilary Smith Head of Insurance Tax Policy

14:05 - 14:45	Operational taxes <ul style="list-style-type: none"> • Back to basics: life policies, pension policies – tax treatment, tax reporting... • Dealing with the pension schemes office • Chargeable events, FATCA/CRS reporting 	Rob Smith Senior Manager EY
14:45 - 15:00	<i>Coffee Break</i>	
15:00 - 15:40	I minus E <ul style="list-style-type: none"> • Short recap • Investment in collectives 	Jon Garrett Associate Director Grant Thornton
15:40 - 16.20	Employment tax hot topics <ul style="list-style-type: none"> • employees working from home/abroad • HMRC initiatives 	Jim Boylan Head of FS Employment Tax Mazars
16:20 - 16:30	Recap and closing remarks	Neil Rolfe Head of Insurance Tax Mazars
16.30 onwards	<i>Drinks</i>	