

February 2010

Supporting employee  
share ownership

## The 2010 *ifs* ProShare Annual Conference and Exhibition



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We are delighted to announce that this year's Employee Share Plans Conference & Exhibition will be held on Wednesday 13 October at the British Museum on Great Russell Street in London. This is a stunning venue for those of you who have not visited it before.

Our 2009 Conference & Exhibition was our most successful to date and our aim is to make the 2010 event even bigger. Details on sponsorship opportunities will be available shortly but to register your interest please contact Julie Richardson on 020 7444 7104. Sponsorship and delegate rates will be frozen at the 2009 levels.

You may recall that in 2009 we invited members to submit suggestions for presentation topics they would like to deliver on the day. This approach worked well last year and we will again be contacting members for suggestions in early March, so get your thinking caps on.

Our website will be updated regularly over the coming weeks and months, so for up-to-date information please visit [www.ifsproshare.org](http://www.ifsproshare.org). For more information on sponsorship packages please contact Julie Richardson on 020 7444 7104.

### Events

We began in January with the **Review of 2009** kindly hosted by Computershare. This gave us all the chance to look back at 2009 from the perspective of an adviser, a company and an administrator. This event was free for members and our thanks go to Vivian Haynes (S J Berwin), Jeremy Mindell (Henderson Global Investors) and Iain Wilson (Computershare) for sharing their thoughts on what was another eventful year. The weather was not as kind to us as it could have been, so thanks to all those who attended.

Feedback showed this to be a popular and well-received event providing an excellent opportunity for networking.

**Celebrating Excellence** took place on 10 February and was kindly hosted by Baker & McKenzie. Over 80 delegates attended this event to hear first hand from our 2009 winners. All our 2009 winners were in attendance to share their experiences and ideas for best practice. Stuart Bailey, Chair of the Judges in 2009, was on hand to provide an overview of what makes a winning entry. We have already started work on the 2010 Annual Awards so look out for more details in the near future.

Feedback on this event was extremely positive with many delegates going away with new ideas to consider.



# Training courses and workshops

We recently carried out a short online survey to ascertain views on new training courses and workshops we are considering. We were very encouraged by the responses received and will be using this information in the formulation of our programme.

Below are details of forthcoming confirmed training courses and workshops. We are still adding events to the programme so please do check our [website](#) for up-to-date details.

Tuesday 2 March	Who is doing What?
Thursday 4 March	An Introduction to Employee Share Plans – Technical Course
Wednesday 21 April	Executive Share Plans
Thursday 29 April	Employment Law Changes Impacting Share Plans
Thursday 13 May	How to Enter the <i>ifs ProShare</i> Awards
Tuesday 18 May	An Introduction to Employee Share Plans – Technical Course
Wednesday 26 May	An Introduction to International Employee Share Plans
Tuesday 8 June	An Introduction to Employee Share Plans – Practical Course

## Booking

Each course will give delegates the practical skills and knowledge they need when managing or advising on an employee share plan. Full details of all training courses and workshops are available on our [website](#). If you are interested in attending, all you need to do is select the course that best suits your needs and make a booking.

To make a booking, please download and complete the relevant [Booking Form](#) from our website and return it to the address given on the form. Courses are booked on a first come, first served basis.

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# HMRC and HM Treasury update

Kevin Meehan retired in December from HMRC's Employee Share Schemes Unit. Over the years Kevin attended many of our Focus Group meetings and other events and we wish him well for the future.

In December the [EMI Manual](#) was made available on the HMRC website and in January the long-awaited [SIP Manual](#) was also uploaded to their website.

Within HM Treasury, responsibility for SAYE, SIP & CSOP has moved from the Assets, Savings & Wealth team to the Growth and Enterprise team where the EMI already sits. We will continue to meet with HM Treasury on a quarterly basis and further build on our existing relationship with them.

## Membership update

Membership invoices for the forthcoming year will be issued shortly for those members with a renewal date of 1 April 2010. We are pleased to confirm that in 2010 there will be no increase to member subscriptions across any of the membership categories.

Our thanks go to all our members who have supported us over the last year and we look forward to continuing to work with you in 2010.

## *ifs ProShare* Co-ordinator appointed

We are delighted to announce that Sarah Steadman joined *ifs ProShare* in January as the *ifs ProShare* Co-ordinator. Sarah was previously the Share Schemes Co-ordinator for Henderson Global Investors and holds the ICSA Certificate in Employee Share Plans. Sarah will be involved in providing support to all areas of *ifs ProShare* and will be taking on the management of the Training Course and Workshop Programme.

Sarah's email address is [sssteadman@ifsllearning.ac.uk](mailto:sssteadman@ifsllearning.ac.uk) and her direct telephone number is 020 7444 7141.