

## Join ICAEW President, Fiona Wilkinson to commemorate first female member



Celebrating women in  
Chartered Accountancy

2020 marks 100 years since the date that ICAEW first began to admit female members in May 1920. In particular, it celebrates the achievements of Mary Harris Smith, the first woman to be admitted as a member of ICAEW (Mary was admitted as an honorary fellow, as she hadn't taken exams) which made her the world's first female Chartered Accountant.

We will be celebrating this centenary at our AGM event on the afternoon of Wednesday 13 May 2020 at Boringdon Park Golf Club, near Plymouth. Fiona Wilkinson, ICAEW President, will be one of the guest speakers on this occasion. Fiona will not only celebrate progress towards gender equality in the profession but will discuss what more needs to be done to widen access to the profession.



Simon Wheatcroft, a truly inspirational speaker, will complete proceedings. Being blind means that Simon's ability to adapt and use technology has enabled him to achieve incredible goals; from learning to run alone outdoors to crossing the Sahara Desert solo. His keynote talks on diversity, inclusion and technology draw on his remarkable achievements, push boundaries and motivate others to reimagine what is possible.

Please look out for more details or contact Trudi on [trudi.coles@icaew.com](mailto:trudi.coles@icaew.com), we do hope as many members as possible will be able to join us.

## AWARD-WINNING, STAND-UP COMEDIAN JO CAULFIELD ANNOUNCED AS ANNUAL DINNER GUEST SPEAKER



Why not take the opportunity to entertain your staff, clients or other business professionals at our annual dinner this year?

The black-tie event will be held on Friday 24 April 2020 at Sandy Park, Exeter from 18:45 to midnight and will include a champagne reception, four-course meal, an excellent after dinner speaker and dancing to local band; Limited Company.

Best-known for her legendary one-woman shows, Jo Caulfield is 'one of the finest female comics at work' (*The Observer*) and has been nominated as 'the best female Stand-Up in the country' (*Chortle.co.uk*).

Jo was born in Wales to Irish parents and brought up in Derbyshire, Nottinghamshire and Leicestershire. She grew up believing the East Midlands was her oyster. Aged 17, Jo left home and moved to London to sing and play drums in a Rockabilly band. This was an unusual decision as Jo can neither sing nor play drums.

Jo has appeared regularly on our screens with appearances on shows such as: *Have I Got News For You*; *Mock The Week*; *Michael McIntyre's Comedy Roadshow*; *The Wright Stuff*; *It Takes Two* and *Bremner, Bird and Fortune*. She has also had stints as a guest presenter on BBC One's *The Politics Show* and *The One Show*.

Tickets cost £70 + VAT. Tables of between 8 and 12 guests are available but individuals and smaller groups are equally welcome.

For more details and to book tickets please contact Trudi on [trudi.coles@icaew.com](mailto:trudi.coles@icaew.com)

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# President's message



Sophie Parkhouse,  
President, ICAEW South West

I can't believe that six months have passed since I wrote my incoming message! Where does the time go? What a busy time it has been for us all too, the general election has taken place, the Sir Donald Brydon report on audit quality and effectiveness has landed, Christmas and New Year have come and gone, and we have met the tax return deadline!! And, that is without considering the wide range of ICAEW SW events which have been keeping us engaged! WOW!

I remember starting my term of office, mulling over the many changes that are taking place to our environment and having the feeling that we really are at a turning point in our profession. I believe we are still in this position. The background notes to the Queen's speech were evidence of this and noted that audit reform and corporate reporting would be on the agenda for government this parliament. Now that the three major reviews that will influence the reform, Kingman, the CMA and Brydon, are complete, we are in a place of limbo, while we await the formal proposals, and visions of exactly what the new landscape will bring.

Such wide scale reforms may leave some feeling frustrated. I often hear comments such as 'all of these changes are imposed' and 'the views of the smaller business are not heard'. There is often a feeling that there is a lack of opportunity to get a point of view across. However I would like to challenge this frustration.

Since being an engaged member of ICAEW SW, and not necessarily as an office-holder, I have had many opportunities to attend discussion groups, comment on exposure drafts and participate in round table events, all of which have enabled me to have my say. I would be lying if I said I had never been nervous on entering an unknown location, with unknown persons (all seemingly much more important than myself), or been concerned as to whether my view was valid

enough to share, however I can confirm that no one has ever made me feel that way if it was the case! One of the benefits of being engaged with an active society is the wide reaching contacts and opportunities it can bring, be that commenting on a draft auditing, financial reporting or ethical standard at a technical advisory meeting or taking part in a round table event on the Brydon review, a full range of opportunities are present. I would therefore like to raise a challenge to you this year to try to ensure that if there is something you are passionate about, or something which you know will have a huge impact on you, grasp any opportunity to get involved and make your contribution in a way that works for you and hopefully you will find, like I have, that you do have something to say and that you can make a difference!

## A BUSY YEAR FOR ICAEW SOUTH WEST IN 2019

We try and organise a good variety of events and hope that there is something for everyone. Please do let us know if you have any suggestions for future events and activities by contacting Trudi at [trudi.coles@icaew.com](mailto:trudi.coles@icaew.com). Please do take a look at the flyer enclosed with this newsletter to see what we have coming up for you this spring.

50+ x CPD courses in partnership with Mercia incorporating SWAT (held in five locations: Yeovil, Taunton, Exeter, Plymouth and Cornwall)

- 1 Insolvency Conference
- 2 Member in Business Update
- 2 Practice Management Update
- 1 Annual Dinner
- 1 Exam Qualified Reception and Student Awards
- 1 AGM
- 6 Screenings of the ICAEW film *Without Question* (Taunton, Truro, Plymouth, Barnstaple, Yeovil and Exeter)
- 13 Town Group meetings (West Cornwall, North Devon, South Somerset and Plymouth)
- 2 Female Forums
- 11 Business member breakfasts (Exeter, Taunton, Yeovil, Plymouth and Cornwall)
- 1 CABA workshop: Better People Management
- 1 Excel workshop
- 3 Young Professional Quiz nights (Exeter, Plymouth, Taunton and Truro)
- 1 Financial Planning workshop
- 2 Joint Professions Networking Group, Exeter (Supporting role)
- 1 ICAEW SW Golf Day

## WORKING TOWARDS GREATER INCLUSION

As we celebrate the centenary of admission of the first woman member, ICAEW's focus on diversity has never been stronger. Like many other organisations, including firms of accountants, ICAEW decided to examine the diversity of its own workforce and the composition of its committees, so the Diversity Advisory Group was established in 2016 to report to the Board.

Its remit was to look at best practice in diversity, inclusion and equality in different industry sectors and to consider UK and internationally relevant practices, examining ICAEW statistics on membership and staffing, identifying issues and drawing them to the attention of the Board for consideration and potential action.

While the group was initially set up to look at diversity within ICAEW and in its committees, its activities have undergone a natural expansion as the relevance and impact of the diversity agenda in society as a whole continues to grow. ICAEW's public interest role requires it to be accessible to everyone in the wider community so it is important that it reflects positive changes in society, embracing equality in all its aspects.

### INITIATIVES

As a result of the group's recommendations, in 2018 ICAEW signed up to the Women in Finance Charter. This has expanded to holding events for members and the establishment of the women in finance community.

Recognising the wish to create a more ethnically diverse profession, events have included speakers and representatives of different nationalities.

The group has also examined ways in which the needs of disabled members and students are met. ICAEW has implemented many improvements in disabled access to its premises, with website guidance on the employment of disabled people, and meeting their needs.

As part of its work in improving social mobility and widening access to the profession, there is a programme to target schools in inner city areas. These initiatives have been supported by a number of diversity courses and webinars.

The group continues to consider how ICAEW should adapt and change and this now extends to providing collaborative and networking opportunities to members. Reflecting their interest, ICAEW launched the diversity community in 2018. Access free information and updates at <https://bit.ly/36zGwbY>

## New regional director



Bev Waters started as ICAEW Regional Director South and South West on 2 December, and will be working from her home, in a small village north east of Dorchester.

She joins us with an in-depth knowledge of ICAEW, having worked at Chartered Accountants' Hall in London for almost 10 years as Senior Strategic Relationships Programme Manager, heading up a team that looks after the Top 30 accountancy practices alongside the ICAEW Executive Team.

However, Bev's engagement with the profession goes back much further than the decade with ICAEW. She previously worked in three different Surrey-based accountancy firms leading on marketing and business development.

'I'm really looking forward to working in the area, developing services and opportunities for ICAEW members. I will be attending many of the district society events over the next couple of months and look forward to meeting people and hearing what they want from ICAEW.'

## SWECASS - STUDENT INDUCTIONS



September is the time of year when many start their ACA journey. This year SWECASS welcomed these students to ICAEW with dinners in Exeter, Taunton and Truro.

These new starters were joined by current students and young members thus providing a great opportunity to network and meet others in the local area.

It was lovely to see so many new faces and the committee hope to see many of them at events throughout the coming year. See the full calendar on the back page.

# One Young World - Jackie Crane

Jackie attended the One Young World (OYW) summit in October 2019. It was held in London at venues including the Royal Albert Hall, Central Hall Westminster and the Queen Elizabeth II Centre.

## What was the OYW experience like?

In one word - incredible!

I didn't know what to expect when I arrived in London. We were invited to Chartered Accountants' Hall on the Monday evening with Michael Izza (ICAEW CEO) and Fiona Wilkinson (ICAEW President) which was a really nice way to start the week. I got a chance to meet Ali Qasim who attended the summit last year which gave me a chance to ask all of the questions that were causing me anxiety about the week. I met the Chartered Accountants Worldwide cohort of 20, with whom I would be spending my time at the summit.

For those who don't know what the summit involves, it is a huge conference attended by people under the age of 35 who have a passion to lead and inspire change in the world. There are a huge number of celebrities, like Ellie Goulding, Richard Branson, Meghan Markle, JK Rowling (to name just a few) who speak about how to lead and inspire and to share knowledge they have learnt about causes close to their heart. They also have ambassador speakers. These are people who are attending the summit but have also achieved amazing things through difficult circumstances. Most of the summit speeches can be found on Vimeo (on the One Young World channel).

## What were the key things to take away from the summit?

The summit covered five key themes: education, planetary health, media freedom, poverty alleviation and peaceful futures, as well as an overarching focus on leadership. I learnt so much from the summit and I want to work out how to share all this knowledge with people in my network, so this article is a great place to start!

The key things I took away from the summit were ...

### PLANETARY HEALTH

We each need to invest some time in understanding global warming and appreciating the impact it is having now and in the future. I learnt that plastic isn't necessarily a bad thing with the improvement in technology creating recyclable plastics and, even more surprising, plastic can actually have a lower carbon footprint than glass. Perhaps the #PlasticFight might be the wrong battle to have at the moment.

Instead, I feel like we need to focus on the circularity of goods and consider the waste we are creating in every day life. If each of us make decisions every day we can start to limit the waste created. We are all encouraged on a day-to-day basis to create waste so let me throw

some questions out there ... Do you really need a new phone when your contract ends? Have you repaired the hole in your jeans instead of replacing? Do you really need a new jumper to add to your overflowing collection? Each time we make a decision that reduces the waste created, or avoids creating more waste, it is making a difference to the world immediately.



### POVERTY ALLEVIATION

There were two monumental points that I learnt from this plenary session!

**The first** - Modern slavery exists in pretty much all goods and services you pay for. I feel like we are shielded from the reality of slavery across the world and because we can't see it, we are oblivious to it. Every year, thousands of men, women and children across the world are forced to work, getting little or no pay, to create products for you and I. You would be surprised at how many goods this affects, some examples being mobile/laptop batteries, fresh produce, chocolate etc.

A modern slavery statement must be made in the UK by all commercial businesses with turnover exceeding £36m, but what does this mean? I've read a few statements but they cannot guarantee that slavery is non-existent in their supply chain. We need to be holding businesses accountable to make sure they are doing all they can to prevent slavery and encouraging smaller businesses to consider their supply chains.

Good to know: Tony's Chocolonely is 100% slave free chocolate.

**The second** - Volunteering in orphanages around the world is potentially creating a business whereby children, who are not orphans, are forced to live in orphanages because of the vast amounts of money these 'business owners' make. The Lumos Foundation has created a campaign called #HelpingNotHelping to highlight the issues with orphanage tourism around the world. Volunteering should not be condemned but if you are planning on travelling abroad to volunteer, please do your research and check that the place you are visiting is legitimate. These are real people suffering because of our actions so let's not be part of it but use our time to help real causes.

I would recommend watching the videos on Vimeo which give you such a breadth of topics.

### **What did you learn that you can apply to your own life, business or organisation?**

As a consumer you are paying for a product or service while confirming you support the actions of that business. In business we need to lead this movement by demonstrating our commitment to making a difference in the world, through supporting sustainability, preventing modern slavery and working towards the Sustainable Development Goals (2030). Our purpose as a business is more than making a profit and I would love to see the impact we can make on the world, not only through our business but also through the clients we work with!



### **How can your experience help others?**

I love to be able to share information I have learnt. I started up a blog page which I encourage you all to visit (<https://2019charteredstar.home.blog/blog/>). The blog discussed the summit, has links to the Vimeo pages, discusses key points I've taken away from the summit and in the future will look at how we can all make a difference. Join me in this journey to share knowledge and make a difference in the world.

## **ARE YOU AN ICAEW MEMBER IN BUSINESS?**

Are you getting good value from your membership of ICAEW? Sadly, too many business members that I meet are not aware of the vast range of resources available from ICAEW.

Have you recently checked the Preference Centre on the ICAEW website to ensure that you are receiving the regular information that would be useful in your work, or have you opted out of everything and receive few, if any, communications from ICAEW nationally or the South West District Society? Unfortunately, those who fall into the latter group are unlikely to be reading this article as they will not be receiving this twice-yearly publication with a wealth of information about events in this district.

For business members there is a free twice-yearly update held in May and November at Exeter Racecourse. The fifth of these updates last November attracted a record attendance of over 70 members. There was a wide range of topics, starting with a useful insight into the possible customs arrangements which might apply now a Brexit deal is agreed and the alternative procedures which might apply in January 2021 if a trade deal with the EU has not been agreed by 31 December 2020. The second technical topic reminded us of the changes in reporting requirements that now apply for accounting periods starting on or after 1 January 2019.

The update meeting was given a brief summary of the wide variety of services available from CABA before we had a lively presentation on the ABCD technology for accountants – A for Artificial Intelligence, B for Blockchain, C for Cyber and D for Data. Finally, the members present received some useful and constructive suggestions on cyber security.

The next update will be held on Thursday 21 May 2020 at Exeter Racecourse.

Business members are also invited to join small groups that meet for breakfast three times a year at four locations in the district – Cornwall, Plymouth, Exeter and Taunton. A variety of topics are discussed and there is often a useful exchange of information and experiences. The next round of these (free) meetings will be held in February and March.

Nationally, Iain Wright, the director of business and industrial strategy, who was appointed early in 2019, has introduced several new initiatives which should lead to greater engagement with business members.

Letters of congratulations are being sent to ICAEW members in business on promotion or good company results. This has been a significant success and is proving to be a useful tool for engaging business members. If you have any news stories please send them to me so I can pass them on and letters of congratulation can be sent.

On the ICAEW website, there is a new business member hub, [icaew.com/business](https://www.icaew.com/business), which is now live. There are a lot of useful resources for business members.

The value of the quarterly *Business Confidence Monitor* is generally recognised. Copies are available on the ICAEW website. In the latest edition, late payments was a key theme with local government being noted as the worst payers as they tend to use the traditional ledger model and extend payment terms due to running out of funds. It was also noted that some organisations are asking for rent in advance with businesses often going bust the day before rent is due.

ICAEW has a number of communities, many being free to join. Are you a member of those communities that are relevant to your work? Successful events have been held recently for both the construction and retail communities. The demographics of communities are particularly varied with many young members involved. The manufacturing advisory group is moving to the West Midlands. The Corporate Governance community is now free and the Data Analytics community, also free, is now live.

Make the most of your membership of ICAEW – there is so much available to help in your work and leisure.

### **John Ashley**

South West Business Members' Representative  
[john@oakehouse.co.uk](mailto:john@oakehouse.co.uk)

## Skills for the South West



In my role, a good deal of my time is spent in the regions talking to members in business. The South West, with its tech hubs and thriving financial services sector has a huge demand for talent, but what I hear from members in the region is that local companies cannot access the skills they need to grow and thrive. In fact, recent research conducted by ICAEW and Oxford Economics has shown that in the wake of Brexit and the increasing demand for digital skills in the workplace, this skills shortage will only become more acute.

We believe that with their keen business insight, ICAEW members are uniquely placed to offer solutions to the widening skills deficit. That is why in February, my team will be conducting a series of consultation roundtables across the country, looking into the nature of skills gaps from region to region and possible solutions to this issue. The evidence taken from these sessions will form the basis of a major ICAEW publication that will provide practical recommendations to the private sector, local business policymakers and central government on how to resolve skills shortfalls. This report will then be used to lobby government around skills needs across the country.

This is a key opportunity for ICAEW members to shape their local skills programmes and to have their voices heard by the very highest levels of government. On 7 February, ICAEW ran a consultation roundtable for this report in Exeter with a number of high profile members of the business and practice communities around how their companies are responding to skills shortages. Don't worry, though, if you'd still like to contribute to this piece of work, do get in touch with me at [rosalia.wood@icaew.com](mailto:rosalia.wood@icaew.com).

**Rosalia Wood**  
ICAEW Regional Industrial Strategy Manager

## ICAEW FEMALE FORUM

Our female forum in October was run by Agar Management Consultancy and was an Introduction to Insights Discovery.

It has been well documented that good leaders are very self-aware, and the Insights Discovery provides a tool to improve on that self-awareness. Jack and Clare from Agar provided a safe, fun environment for us all to explore our own personality type and to pick up tips for dealing with others.

Once again, we had a large number of delegates. For some, the Insights Discovery was a new experience, but even for those who have used the materials before there was more to learn.

My dear mum used to say, 'It takes all sorts to make a world' and ensuring we have diversity in its broadest sense makes for a stronger team. Learning about others' preferences and how to interact through the Insights programme has been invaluable to me.

Thank you to the continuing generous support from CABA and also to Agar for hosting the session.

We are planning the next events, so please look out for the dates.

**Caroline Smale**

## Gourmet v Gourmand!



Bright and early on 6 December, the first question of the day was: gourmet or gourmand? Naturally this was the question of the breakfast order at Jack In The Green in Exeter where we held the first ICAEW SW Celebratory Fellowship event. We had an informal gathering of 11 members who travelled from across the South West to start their day together in merriment, celebrating the achievement of 10 years as an ICAEW member. What made the event particularly successful was that most of these members had not previously been engaged with ICAEW SW, but they now see the benefit of engaging with others at one of our current events or joining in new initiatives such as the Sustainability group which are in the pipeline! Although a lot of fun and food was had there was also plenty of reflection on where the last 10 years have taken us as members of ICAEW and thought about what we should do with the next 10 years.

# Developing talent for sustainable careers, societies, businesses and economies

ICAEW continually reviews the relevance, perception and attractiveness of the ACA qualification to ensure that it remains not only fit for purpose but continues to add value to businesses, provides exciting careers for individuals and ensures that local, national and international communities have access to expertise that can help them prosper.

In April 2019 there were two consultations held in the South West and West of England regions to consult with employers on the Future ACA. This was then replicated across the UK and overseas, receiving input from employing organisations, students, members and our partners in learning. We tested a number of proposals for potential future developments which were based on some initial research which was undertaken earlier in the year.

We were delighted to receive over 2,000 responses from our partners around the world and the feedback from the consultations was overwhelmingly supportive of the majority of proposals. The proposed changes to form part of the Future ACA are shown below and as changes start to take place in 2020, employers and students will receive plenty of prior notification.

If you or anyone in your organisation would like to know more detail about these changes or the opportunity to support staff through the ACA qualification, then please contact Regional Business Development Manager for the South West, Rowena Hawkes on +44 (0)7901 006 898 or rowena.hawkes@icaew.com

Future ACA	<b>Ethics &amp; integrity</b>	Redevelop Ethics Learning Programme		Further integrate ethics into exam scenarios
	<b>Professional skills</b>	Continue to enhance assessment of professional skills through scenario and case study questions		
	<b>Technological change</b>	Introduce data visualisation software into exams from March 2021	Computer Based Exams retender to improve delivery & functionality of exams	Continue embedding technology content into the syllabus and exams
	<b>Professional scepticism</b>	Continue to develop exam question styles to reward the use of professional scepticism		Continue to introduce statistical underpinnings to support ACAs questioning validity of data
	<b>Technical knowledge</b>	Permitted texts available as soft copy and hosted on the exam software		Learning materials content to be designed for digital delivery

## #CharteredStar

If you've been inspired by Jackie's experiences at the One Young World (OYW) summit then here is your chance to get involved. Each year ICAEW runs a competition to find the next #CharteredStar to represent ICAEW at the summit. For those of you who are interested in attending the 2020 OYW summit in Munich you will need to follow the ICAEW LinkedIn/Facebook/Twitter pages for details, normally released in April.

ICAEW students or members (up to the age of 35) with a passion for making a difference should apply. Jackie told us 'the summit is an absolutely life-changing experience which gives you the

tools and self-belief to start making a difference in the world, starting with the people around you. Personally, I have attended ICAEW Council Conference as a panellist, been a judge at the BASE competition final, discussed current issues impacting accountants with the ICAEW CEO, Michael Izza, and I have recently been selected to be on a panel for a global meeting of CEOs with IFAC (International Federation of Accountants).'

Jackie's final words of wisdom: 'Just go for it! You have nothing to lose by entering the competition but with so much to gain. I think you can do it!'

# Eight countries, seven weeks, one profession – the life of our ICAEW President, Fiona Wilkinson

The final two months of the year are always a tremendously busy time for any ICAEW President, and I'm glad to report that 2019 treated me no differently.

Since mid-October, I have visited Hong Kong, Malaysia, Singapore, Canada, Brussels, Dubai, Mauritius and India – a fantastically dynamic mix of cultures and indeed climates. I've met with members and students, engaged with accountancy firms, businesses and public bodies, and developed relationships further with some of our partner professional bodies and academic institutions.

## HONG KONG

I began with a visit to Hong Kong, where we now have over 2,900 members and continue to work closely with HKICPA. Our annual Gala Dinner never fails to impress and served once again to celebrate the achievements of our members and provide fantastic opportunities for networking. Three past female HKICPA presidents attended, along with their recently-appointed CEO, Margaret Chan – and our professional stories resonated greatly with each other.

## MALAYSIA

A jam-packed itinerary in Malaysia then set the rhythm for the weeks ahead. Our Global Accounting Scholarship Award ceremony at Sunway College once again showcased an awe-inspiring cohort of young talent, with scholarships being awarded to 61 students who had achieved at least 9 'A' grades at the GCSE equivalent – including 11 who had achieved at least three 'A' grades at the A-Level equivalent. Outside the college stood a life-size cut-out of a Sunway graduate – Ng Yi Sze – who achieved the highest score in the world in last year's ACA Professional Level exams.

I had the pleasure of speaking with Ng and other members and students at our annual 'Celebrating Excellence' awards and graduation ceremony, later in Kuala Lumpur. This event was a huge success as ever, professionally run and I'm delighted to say was attended by two of our Council members in the region, Dato Gan and David Lim.

A members' networking event, a Sunday afternoon life members' tea in Penang and two separate engagement events at universities that anticipate joining our strategic credits programme – both of which included screenings of *Without Question*® – rounded off a highly enjoyable and productive trip.

## SINGAPORE

I travelled directly from Malaysia to Singapore, where the first highlight was a student networking night – with an opportunity to meet current and potential future students, as well as some of our new members.



Fiona Wilkinson  
ICAEW President

Our Singapore Annual Dinner was excellent and served as the perfect showcase to mark the 10<sup>th</sup> anniversary of our activities across South East Asia – with spectacular food and entertainment, and a wide array of guests from across finance and business.

This trip concluded with a 'high tea' with senior and retired members, which was very well received. These events have become more frequent in recent years and are an important part of recognising the lifelong professional contributions that so many of our members make.

## CANADA

In Vancouver, Canada, I was privileged to be appointed to the board of IFAC – a role which will allow me to bring ICAEW's knowledge and insight to the most senior levels of the global accountancy profession, and to foster relationships with the chief executives and office-holders of other world-leading professional accountancy bodies.

## BELGIUM

In Brussels, I delivered the keynote speech at our 'Women in EU Finance' panel event. This was a joint initiative with the City of London Corporation, and welcomed speakers from across Europe to share their perspectives on the contributions being made by women in the financial services sector. Events like this serve as an important forum for us to come together and share success stories, and to help us understand the challenges we still face.



## DUBAI

As ever, our annual Middle East Honours Dinner in Dubai was notable for its spectacle, as we recognised excellence and particular achievements in business and finance across the region. Our keynote speaker was British journalist, Rachel Johnson, and during my own speech I focused on this being a time of change and disruption across business, and how our profession must face down the challenges and embrace the opportunities.

## MAURITIUS

In Mauritius, I signed a memorandum of understanding with MIPA, re-affirming our two institutes' close collaboration for the future. The Chair of MIPA then attended our ACA Graduation Ceremony, at which I was proud to present 17 new graduates with their certificates, and the SOCAM Annual Dinner once again proved a highlight of the ICAEW calendar.

## INDIA

On to India, and in Mumbai we held a 'Finance in a Digital World' event, discussing technological change and the challenges for our profession. This doubled up as a new members' event, awarding those new members who have joined us via our Pathways to Membership programme - which is becoming increasingly popular in India. One of our new members was Vankipuram Parthasarathy, CFO & CIO of Mahindra Group - proving that ICAEW membership can be of value whatever stage you're at in your career.

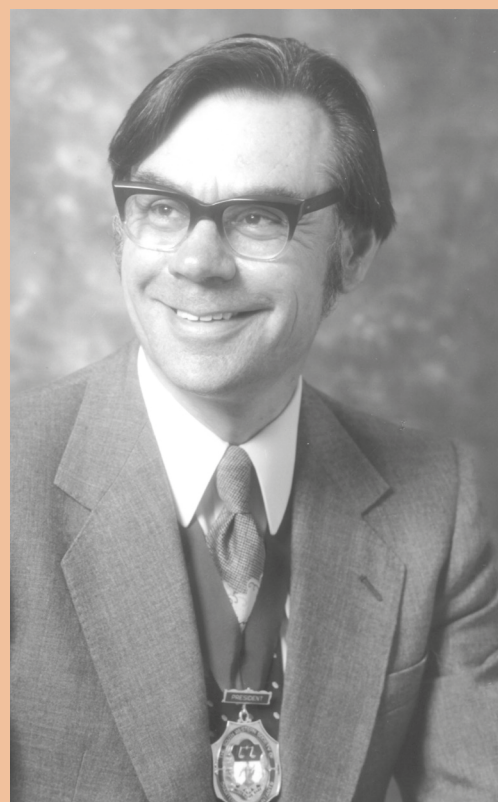
Later in Mumbai, I attended the ICAI International Conference, attended by over 1,000 delegates, and took part in a panel, 'The accountancy profession meeting stakeholders' expectations'. I spoke about the need to address the audit expectation gap and of some of the challenges for our profession in the UK, and was questioned about the use of 'Inflo' software in our ACA exams.

## OTHER ENGAGEMENTS

Across these trips, my numerous meetings with member firms, businesses, public bodies and academic institutions also served to open the door to new relationships, and to further cement some of our most valuable partnerships. Global interest in our qualifications, thought leadership work and corporate training films undoubtedly continues to build.

I'm also pleased to report that our celebrations to mark the centenary of our first female member, Mary Harris Smith, are continuing with momentum across the world. In Singapore, Canada and Dubai, I attended lunches with some of our female members and senior women from business, who shared inspiring stories about their journeys to the top of their professions. I've been struck by the level of enthusiasm with which members and others - both male and female - have engaged with this campaign, and I look forward to this continuing as we head towards the anniversary in May 2020.

## JOHN EVELY, ICAEW SOUTH WEST (SWSCA) PAST PRESIDENT



We started the New Year with the sad news that John Evely had died just before Christmas. John qualified as a chartered accountant in 1952 and worked for a time in Africa. He joined A C Mole & Sons, Taunton in 1962 and was a partner for many years.

John took on the treasurership of Somerset County Cricket Club in 1969 and introduced new financial controls which were so successful that he was invited to Lords to lecture to the other counties on the merits of proper financial disciplines. He resigned the treasurership in 1979, the year Somerset won both the Gillette Cup and the John Player League.

He served as president of ICAEW South West (SWSCA) in 1980-81 and continued to be involved with the district society throughout his life, including attending the AGM and past presidents' lunch last year at the age of 89.

A keen golfer, rugby enthusiast and music lover, John lived life to the full. He will be greatly missed by all those that knew him.

# Our Planet: Our Business – should we be doing more?

We are at a unique moment in human history. WWF's *Living Planet Report* shows that since 1970, global wildlife populations have declined by 60%. We have changed our planet so much we have brought on a new geological age - the Anthropocene. The impacts on our wildlife, climate, rivers, forests and oceans are profound, as are the consequences for humanity. Businesses, governments and the public need to understand the profound effect we've had on the planet and be involved in the solutions.

Following the huge success of Netflix's *Our Planet* series which launched in April 2019, this new film has been produced by the award-winning team behind the series specifically for a business audience. It combines stunning wildlife footage with the voices of influential business leaders. The film shows how economic stability depends on nature's stability – we can't have one without the other. And like the *Our Planet* series, it has a positive message that change is possible and businesses can play a fundamental role in saving the planet.

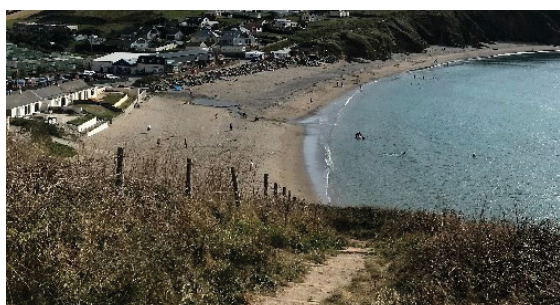
We will be showing this film at a breakfast event in Exeter (venue TBC) on Thursday 21 May (07:30 to 09:30) with Francesca Sharp, ICAEW Sustainability Manager facilitating. After the screening there will be roundtable discussions on how both we as individuals and our organisations can respond to the challenges raised in the film.

Please see enclosed event programme flyer or email Trudi (trudi.coles@icaew.com) for more details.

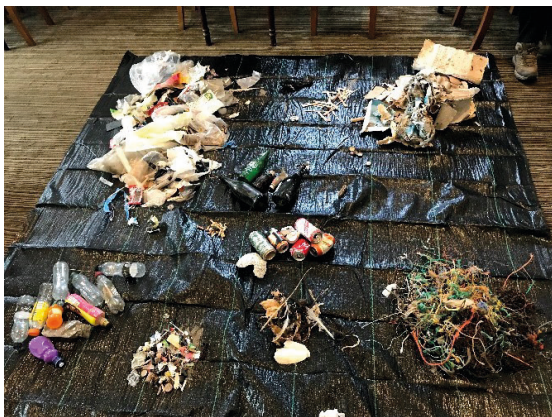
## SWECASS – BEACH CLEAN

On 21 September, SWECASS joined a beach clean organised by the Marine Conservation Society at Challaborough Bay. It was a fantastic day out, and it was great to meet and connect with those working both in practice and industry while giving back to our community, protecting the local coastal wildlife from litter and other human pollution.

When we arrived, we were surprised by how 'clean' the coastal area looked until we actually started looking for trash.



Undeterred by various pesky plastic bags in hard-to-reach places, we worked hard and quickly amassed several bags of rubbish, contributing a huge amount to the haul, while enjoying breathtaking views on our coastal path walk.



We stopped for a well-deserved lunch in the afternoon, agreeing that it had been both a fun and rewarding day out. Thank you to those that could make it, and we're looking forward to more exciting and different social events in the future!

**Sherv Cheung**  
SWECASS

## PRACTICE MANAGEMENT UPDATE

In November ICAEW practitioners from across the South West filled a conference room at Sandy Park in Exeter for the half yearly practice management update which this time around had a tech theme. The main update was provided by widely renowned Cloud Expert Matt Flanagan who shared his vision for 'Pimping up' cloud accounting platforms, recognising that many of us have cloud-based accounting packages, however we are not using them to the full. Practitioners awareness was heightened as to what is possible and this enabled meaningful discussions during the networking break when tips were shared on efficiencies could be gained within their practices. These efficiencies were all brought to light with the personal case study delivered by Darren Jasper. Darren shared his experiences of how he has harnessed Cloud technology and enabled it to take him on a journey which has changed his career path and got him to where he wanted to be. The grand finale of the morning was not only a chance to win a hamper containing alcohol and goodies, but a social media marketing update with Vicki Banthorpe. The gift of Vicki being at the end was her effective use of her time during the initial part of the morning! Vicki 'secretly' (although no part of social media is a secret!) reviewed some of the attendees, social media profiles and provided real-time generalised feedback, enabling us all to take away ideas on we could all do better!

If you are in practice and have not attended a practice management update before, contact Trudi Coles now who can give you details for the spring session!

# SWECASS Get involved



'My role within SWECASS has given me the opportunity to organise beneficial and fun events for young members in the South West and act as a voice at the wider ICAEW Student Council.

Being part of the committee has also given me the confidence to network among my local peers and practise soft skills which are key to the role of an ICAEW Chartered Accountant'

Kathryn Mansell, ACA student  
South West Chartered Accountants Student Society

E [kathryn.mansell@om.uk](mailto:kathryn.mansell@om.uk)

Scan QR code to see the local student events in your area or search: [events.icaew.com](https://events.icaew.com)

Facebook Group: Search for and Follow 'SWECASS'



## CABA - EAT TO MANAGE STRESS

### EAT TO EASE STRESS

The beginning of the year is always a frantically busy time. When you're stressed it's tempting to reach for processed convenience food, but that could mean you're short of vitamins and minerals when you need them the most. So to get back on track, make these small, sustainable changes to your diet.

### EAT BEANS TO RAISE ENERGY LEVELS

Stress drains away your energy reserves, but good nutrition can build them back up. The vitamin B in meat, wholegrains, lentils and beans nourishes your nervous system and improves how you respond to stress.

### EAT CITRUS FRUITS TO BOOST YOUR IMMUNE SYSTEM

Stress compromises your immune system and makes you vulnerable to bugs, colds and flu. Vitamin C can help you get over a cold more quickly and as a bonus, studies show that it reduces symptoms of anxiety too. Good sources of vitamin C include red pepper, broccoli and kiwi fruit as well as citrus fruit like oranges.

### EAT GREENS TO KEEP CALM

Magnesium moderates your stress response by regulating blood pressure and the stress hormone, cortisol. Magnesium is also needed to release GABA, a calming neurotransmitter. Your body uses up magnesium more quickly under stress, so top your levels up with dark green leafy vegetables, nuts and seeds.



### CONTACT CABA

If you're feeling under pressure, contact CABA. Their services are free and confidential for ICAEW members, ACA students and their close family. For advice and information call +44 (0)1788 556 366, email [enquiries@caba.org.uk](mailto:enquiries@caba.org.uk), or chat online at [caba.org.uk](https://caba.org.uk)

## CONGRATULATIONS

To all our friends and colleagues who have reached the milestone of 50 years of membership

### AUGUST 2019 - DECEMBER 2019

Timothy Bell	John Hoare
Philip Berry	John Lister
David Cotton	Alastair Marr
Ronald Dobree	Jeffrey McCale
Anthony Furze	David Milborrow
Michael Gaskell	Simon Pain
Timothy Giles	Paul Reeve
Anthony Griffiths	Stuart Riddell
John Guillebaud	David Sowerby
David Hankin	Gerald Sturtridge
Lawrence Hill	William Webber

## OBITUARIES

It is with sadness that we mark the passing of our friends and colleagues:

Peter Dennes	Christopher Mason
Peter Dixon	Colin Rawlinson
John Evemy	John Speed-Andrews
Leslie French	John Wain
Stephen Mair	Grenville White

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## SWECASS in 2020



The SWECASS committee meets regularly to plan events of both a social and skill-based nature for our students and young members to take part in. Here are the plans for 2020, keep your eyes peeled for the invite emails:

- 6 Feb Sporting activity after work, Trampoline at iBounce Cornwall
- 4 Mar Sporting activity after work, Clip and Climb Exeter
- 24 Apr ICAEW SW Annual Dinner, Sandy Park, Exeter (student and young member tables available)

Apr (TBC) CABA: Set yourself on the path to success, Taunton

May (TBC) AGM, followed by pizza making, Exeter


6 Jun Charity Beach clean, Exmouth


12 Sep Summer Social, The Eden Project

If you have any questions or suggestions, please get in contact with us via [dawn.mills@albertgoodman.co.uk](mailto:dawn.mills@albertgoodman.co.uk), we'd love to hear from you.

**Dawn Mills**  
President - SWECASS

## Keep in touch

 **@ICAEW\_SWregion**  
For the latest news and events that affect you, from ICAEW Chartered Accountants South West and ICAEW generally.

 **ICAEW Chartered Accountants South West**  
Network and discuss key messages with other chartered accountants in the South West.

**[icaew.com/southwest](http://icaew.com/southwest)**  
For a complete listing of all ICAEW events and CPD courses or if you would like to be sent links to any of the above email Trudi Coles [trudi.coles@icaew.com](mailto:trudi.coles@icaew.com)