



Wiseradviser In Partnership with the Institute of Money Advisers

Further Professional Development (FPD)

Free seminars on the following topics:

- ***Insolvency Options***
- ***Managing Legal Advice Cases & Caseloads***
- ***Utilities & Fuel Debt (Specialist Level)***

June-December 2010

Please note that these courses are administered by the IMA. Should you have any queries regarding the courses, please contact the IMA on 0113 270 8444.

Seminar Dates and Times

Date	Seminar	Location	Time	Lunch
6 Jul 2010	Insolvency Options	London	10.00-4.00	Provided
28 Sept 2010	Insolvency Options	Sheffield	10.00-4.00	Provided
5 Oct 2010	Insolvency Options	Birmingham	10.00-4.00	Provided
16 Nov 2010	Insolvency Options	Newcastle	10.00-4.00	Provided
30 Nov 2010	Insolvency Options	Manchester	10.00-4.00	Provided
28 Jun 2010	Managing Legal Advice Cases & Caseloads	Cardiff	10.00-4.00	Provided
19 Jul 2010	Managing Legal Advice Cases & Caseloads	Newcastle	10.00-4.00	Provided
6 Sept 2010	Managing Legal Advice Cases & Caseloads	London	10.00-4.00	Provided
25 Oct 2010	Managing Legal Advice Cases & Caseloads	Manchester	10.00-4.00	Provided
8 Nov 2010	Managing Legal Advice Cases & Caseloads	Birmingham	10.00-4.00	Provided
17 Jun 2010	Utilities & Fuel Debt (Specialist Level)	Manchester	10.00-4.00	Provided
23 Sept 2010	Utilities & Fuel Debt (Specialist Level)	Birmingham	10.00-4.00	Provided
21 Oct 2010	Utilities & Fuel Debt (Specialist Level)	London	10.00-4.00	Provided

Further information

Insolvency Options

Aim

To give advisers a good understanding of the more complex issues affecting different types of personal insolvency, including Bankruptcy, IVAs, Debt Relief Orders, Admin Orders and insolvent estates.

Including:

- Which debts are covered, and to what extent
- How assets are treated
- Future implications for the client
- Recent changes and new developments in law and practice
- The role of the money adviser

Who the seminar is designed for

Advisers working at specialist level.

Facilitator: Alexa Walker

Alexa has 5 years' experience working as a debt advice consultant and trainer at Sheffield CAB Debt Support Unit and currently as a locum Specialist Support Officer at Citizens Advice Specialist Support. Alexa graduated in 2001 with a law degree from Cardiff University, following which she worked as a debt adviser in a local advice centre. Alexa also works as a duty adviser at the Sheffield court help desk, and is chair of South Yorkshire Housing Law Group. Alexa is a regular contributor to Quarterly Account and Adviser.

Managing Legal Advice Cases & Caseloads

Aim

To allow advisers to identify and adopt procedures and processes which encourage best practice for the management of individual legal advice case files and how to manage personal case loads with reference to advice and debt cases

Objectives

Managing legal advice cases

- Creating a case file
- Progressing a case
- Closing the case

Managing personal caseloads

- Recording and maintaining case notes
- Preview personal caseload
- Establish priorities for dealing with personal caseload

Who the seminar is designed for

Advisers working at caseworker and specialist level

Facilitator: Jerry During

Jerry has over six years' experience in social welfare law, working for law firms, CABs and presently Toynbee Hall. He currently manages a team of FIF Money Advisers and is a duty desk adviser at the Bow County Court.

Jerry worked with the FSA assisting them to identify how effective the Mortgage Conduct of Business Rules were in mortgage possession proceedings. He has wide experience in the area of financial exclusion contributing articles to local newspapers, booklets for local councils and providing talks promoting financial inclusion. He also sat as a member of the Department for International Development's Remittance Task Force which produced the customer charter aimed at making the remittance market more competitive and transparent for migrant communities.

Utilities & Fuel Debt (Specialist Level)

Aims

To enable participants to give competent advice about gas, electricity and water debts to their customers, provide background information on utility poverty and also, alert advisers to some of the current issues in the utilities field.

Objectives

To enable participants to:

- understand the legislative framework of the privatised utilities including the basis on which the competitive markets operate, and to understand and quote the license conditions relating to debt and disconnection and rights to supply
- understand different payment options
- understand the arguments about 'beneficial users'
- explain the companies' powers in theft and tampering cases
- use administration orders to deal with utility debts
- identify breaches of the law and licences and be able to refer breaches to the appropriate body

- secure repayment of arrears on an 'equitable distribution basis' where appropriate
- identify a number of factors which affect fuel poverty and explain some of the facts and figures about utility poverty in England and Wales

Who the seminar is designed for

Advisers working at specialist level.

(A caseworker level Fuel and Utility Debt course will be available from Wiseradviser in summer 2010. Further details will be available on wiseradviser.org shortly.)

Facilitator: Ian Ford

Ian is a freelance trainer and consultant. He is a former Chair of both the MAA and the Public Utilities Access Forum. He was head of Manchester City Council's in-house Money, Housing, Consumer and Welfare Rights advice service. He has also worked developing the Community Legal Service in Lancashire. Over the last twenty years, Ian has contributed numerous articles on utility rights and utility debt to several publications, including four editions of the Fuel Rights Handbook.

Booking Terms and Conditions

- By completing and returning the booking form, you are agreeing to accept the IMA terms and conditions.
- The IMA reserves the right at any time, without prior notice, to change the venue of any seminar and/or the tutor from that described in the published literature.
- The IMA also reserves the right at its absolute discretion and without liability to cancel any advertised seminar because of insufficient delegates in which event any monies paid will be refunded.
- Where a seminar is over-subscribed, a limit of two delegates from one agency may be imposed.
- Please inform us as quickly as possible if you would like to cancel your place. Although the seminars are free, we would appreciate sufficient time to contact replacements.

Making a booking

- Complete the form on the following page and send it to us **by email, post or fax** (details below and on the booking form).
- **We will send you booking confirmation and joining instructions by email.**

IMA Contact details:

Post: IMA Training, Stringer House, 34 Lupton Street, Hunslet, Leeds, LS10 2QW

Fax: 0113 270 2111

Telephone: 0113 270 8444

Email: training@i-m-a.org.uk

IMA / Wiseradviser Training Booking Form

Seminar Details

Seminar:

Seminar Location:

Seminar Date:

Delegate Details

First Name:

Surname:

Name of Organisation:

Address:

Email *:

Tel:

Special Requirements:
(accessibility, dietary)
(lunch is provided)

***We will use this email address for all correspondence about the seminar.**

Please provide the following information

1. Are you a member of the IMA? Yes / No
2. If so, what is your membership number?
3. Do you have an LSC contract? Yes / No
4. Which type of agency do you belong to?
 - a. A CAB? Yes
 - b. AdviceUK? Yes
 - c. Other? Please specify. Yes

Return completed form to:

Post: IMA Training, Stringer House, 34 Lupton Street, Hunslet, Leeds, LS10 2QW
Email: training@i-m-a.org.uk
Fax: 0113 270 2111
Tel: 0113 270 8444 (in case of query)

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