

Presented by:

haysmacintyre

FARRER&Co

Cazenove
Capital



Training courses for charity trustees

Programme for Autumn 2021 – Spring 2022

Some comments from past delegates



“

As a newly appointed trustee this is part of my training and it has given me a valuable insight to this element of my responsibilities.

Price is excellent for course content and setting.

Excellent speakers – very knowledgeable and confident.

Will be back for more! The one day format and pace/timetable are perfect.

Great, up to the moment real life examples.

Very comprehensive, excellent value and extremely relevant.

”

Training courses for charity trustees

This series provides comprehensive training for both new and experienced trustees covering a range of essential topics, including a charity law update and an introduction to charity finance and reporting. The programme enables trustees to pick and choose the courses most pertinent. Many of the courses will also be useful for charity chief executives, finance directors, and other members of the senior management team.

We are running the 'What Every Trustee Should Know' sessions on two separate dates in response to high demand. Held as both a half day virtual event and a full day session, this session is primarily aimed at those who are new to the role, and provides a comprehensive overview of a trustee's duties and responsibilities, including understanding investments and finance, managing risk, and the main issues currently affecting the sector. The two other courses, 'Charity Law Update' and 'Introduction to Charity Finance and Reporting', are half day sessions and focus on either financial or legal topics.

Timetables

Virtual session in October: What Every Trustee Should Know

09:30 Welcome and sessions commence
11:00 Short break
11:30 Sessions recommence
12:30 Q&A
13:00 Event close

Full day session in March: What Every Trustee Should Know

09:30 Registration and refreshments
10:00 Sessions commence
13:00 Lunch and networking opportunity
13:45 Sessions recommence
16:30 Q&A
17:00 Event close

Charity Law Update and Introduction to Charity Finance and Reporting sessions:

13:30 Registration and refreshments
14:00 Session commences
16:45 Q&A
17:00 Event close

Venue

All sessions, save for the virtual 'What Every Trustee Should Know' session in October, will be held at a Central London venue, pending government guidance. Live-streaming will be supported at as many events as possible, please double check your confirmation email.

Confirmation, venue information, map, and joining instructions, as applicable, will be sent to delegates in advance of each event by email.

Cost

We appreciate the challenges of the last year for charities in particular, and we feel it is more important than ever for trustees to be up to date with the requirements of their role and best practice, and so have elected to make all courses this year **free of charge**.

Book now

To book online please visit: www.haysmacintyre.com/events.

Programme

Every session will be run by specialists drawing upon their expertise and experiences and there will be an opportunity for delegates to participate in the discussion during the questions and answers sessions.



What Every Trustee Should Know

12 October 2021

Half day virtual conference

30 March 2022

Full day

Please note that due to COVID-19 our first session will be virtual, whereas our March session is currently planned to be in person, with social distancing in place. Both events will cover the same topics.

This session will provide a comprehensive summary of trustees' duties and responsibilities and will cover issues such as:

- What information do you need as a trustee and what are your legal responsibilities?
- The framework within which charities operate:
 - the legal structures used by charities, the regulation of charities, the role of the Charity Commission, and the public benefit requirement
- Trustees' duties, responsibilities and potential liabilities, and the role of the chairperson
- Responsibilities for identifying and managing risk
- Charity accounting: the accounting and reporting framework, 'unravelling the jargon', preparation of accounts, ensuring you receive the right financial information, and the role of trustees and audit committee
- Charity funds, investments, and banking
- Fundraising: the ground rules; the role of professionals, and corporate support
- Trading: the ground rules and the use of subsidiary companies
- Recent regulatory developments
- Governance best practice

Speakers:

Cazenove Charities, Farrer & Co, haysmacintyre

Venue:

Online (October)

Cazenove Capital, 1 London Wall Place, London, EC2Y 5AU (March)

Charity Law Update

22 February 2021 – Half day (afternoon)

We will look at Charity Commission cases and guidance, the latest developments in charity law, and other legal developments of interest to the sector.

Speakers:

Farrer & Co

Venue:

Farrer & Co, 66 Lincoln's Inn Fields, London WC2A 3LH



Introduction to Charity Finance and Reporting

3 March 2022 – Half day (afternoon)

During this session we will:

- Examine the roles and responsibilities for finance teams
- Examine what makes charity accounts so different to commercial accounts
- Understand the terminology used and the different accounting treatments that apply
- Explore what trustees should expect to receive in management information packs during the year to effectively monitor the financial operation of a charity
- Review the regulation that charities need to comply with
- Discuss the key reporting challenges
- Discuss how to make best use of your annual report and accounts as a public facing document and fundraising tool
- Cover managing risk within finance and consider the governance of financial risk

Speakers:

haysmacintyre

Venue:

haysmacintyre, 10 Queen St Place, London, EC4R 1AG



How to book

Please visit the [haysmacintyre website](http://haysmacintyre.com/events) to book your place online: www.haysmacintyre.com/events

Course costs

We appreciate the challenges of the last year for charities in particular, and we feel it is more important than ever for trustees to be up to date with the requirements of their role and best practice, and so have elected to make all courses this year **free of charge**.

Cancellation policy

We are usually able to accept substitute delegates and appreciate advance notice of any substitutions.

For further information, or additional copies of the programme, contact the haysmacintyre events team by phone at 020 7969 5500 or by e-mail at events@haysmacintyre.com.

The organisers

haysmacintyre

haysmacintyre is a leading mid-tier firm of chartered accountants and tax advisors specialising in the not for profit sector.

Our award winning charities and not for profit team is one of the largest in the country. We are auditor to more of the top 5,000 charities than any other UK accountancy firm, providing high-quality services to over 800 UK and international charities and not for profit organisations.

Charities and not for profit clients represent over 40% of our entire business and we have invested heavily in ensuring that we have strength and depth in all disciplines.

For further information, please contact [Richard Weaver](mailto:Richard.Weaver@haysmacintyre.com), Head of Charities and Not for Profit on:

020 7969 5567
rweaver@haysmacintyre.com

www.haysmacintyre.com

FARRER & Co

Farrer & Co is recognised by the independent legal directories as one of the very top law firms for charity and not for profit expertise in the country. Our large charities team is supported by specialists in other areas of law that affect charities and not for profit organisations, such as employment law, data protection, dealing with land and property, financial services, intellectual property and handling the media.

Peers admit that this charities team is a worthy adversary: "The lawyers really understand the charities sector inside and out, and they are talented throughout the ranks" - Chambers UK

For further information please contact [Emma James](mailto:emma.james@farrer.co.uk) in the Charity and Community team on:

020 3375 7000
emma.james@farrer.co.uk

www.farrer.co.uk

Cazenove Capital

Cazenove Charities is proud to look after over £8.7 billion for around 1,500 charities of all shapes and sizes – something we have been doing for over 80 years.

Our award-winning charity team is 27 strong. Many of the portfolio directors in the team are charity trustees in a personal capacity, helping us to see the world from your perspective.

We are part of the FTSE 100 listed Schrodgers Group. Unusually for a firm of its size, Schrodgers is still 48% owned by its founding family. This puts us in a unique position to take long-term strategic decisions and build long-lasting partnerships with our clients.

For further information please contact [James Brennan](mailto:james.brennan@cazenovecapital.com) on:

020 7658 1183
james.brennan@cazenovecapital.com

www.cazenovecharities.com

[Book online here](http://www.haysmacintyre.com/events)



Presented by:

haysmacintyre

FARRER & Co

Cazenove
Capital