



Presented by:

Cazenove
Capital

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Training courses for charity trustees

Programme for Winter 2017 – Spring 2018

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.

Excellent speakers – very knowledgeable and confident.

Price is excellent for course content and setting.

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.



Overview

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 full day session on 'What every trustee should know' on two separate dates in response to high demand. The full day session, primarily aimed at those who are new to the role, provides a comprehensive overview of a trustee's duties and responsibilities, understanding investments and finance, managing risk and the main issues currently affecting the sector. We will also be offering a refresher session for those with more experience, who would benefit from a half day course on the key elements of trusteeship.

All of our sessions will present delegates with an opportunity to network.

Timetable

The timetable for the full day sessions will be:

- 09:30 Registration and refreshments
- 10:00 Session commences
- 13:00 Lunch and networking opportunity
- 13:45 Session recommences
- 16:30 Questions and answers
- 17:00 Close

Each afternoon session will run as follows:

- 13:30 Registration and refreshments
- 14:00 Session commences
- 16:45 Questions and answers
- 17:00 Close

Venue

All sessions will be held at a central London venue.

Confirmation, venue information, map and directions will be sent to delegates in advance of each event, wherever possible, by email.

Cost

We appreciate the need to keep costs to a minimum in the sector and given recent events, we feel it is more important than ever for trustees to be up to date with the requirements of their role and best practice.

We have therefore reduced the cost of these sessions from £75 to £50 for the full day and from £45 to £30 for our half day session. Any surplus from these events are donated to good causes.

Fees include refreshments and all course materials.

Book

To book online please visit:

www.haysmacintyre.com/events

or alternatively complete and return the registration form attached to this flyer.

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 question and answer sessions.

What every trustee should know – Full Day

28 November 2017 and 8 March 2018

What information do you need as a trustee and what are your legal responsibilities? This session will provide a comprehensive summary of trustees' duties and responsibilities and will cover issues such as:

- 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, 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:

Schroders, 31 Gresham St, London EC2V 7QA



What every trustee should know – Refresher

5 December 2017 and
29 March 2018

Half Day (Afternoon)

For those trustees that cannot spare a whole day, or who feel they need a refresher on the key elements of trusteeship, this half day course picks up the key points of the whole day session in one afternoon. This session will assume a certain level of knowledge of trusteeship and legal duties and is designed as a refresher course.

Speakers:

Cazenove Charities, Farrer & Co,
haysmacintyre

Venue:

Schroders, 31 Gresham St,
London EC2V 7QA

Charity law update

28 February 2018 – Half Day (Afternoon)

We will look at the latest developments in charity law including:

- Possible new charity law
- Fundraising
- Charity Commission cases and guidance CC3

Speakers:

Farrer & Co

Venue:

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



Introduction to charity finance and reporting

14 February 2018 – Half Day (Afternoon)

During this session we will:

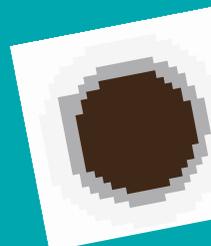
- Examine the roles and responsibilities for finance
- Examine what makes charity accounts so different to commercial accounts
- Understand the terminology used and the different accounting treatments that apply
- Explore what you as trustees should expect to receive in your management information packs during the year to effectively monitor the financial operation of your 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
- Look at the changes brought about by the new Charity SORP
- Cover managing risk within finance and consider the governance of financial risk

Speakers:

haysmacintyre

Venue:

10 Queen Street 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

Alternatively, please return your registration form and a cheque made payable to 'Trustee Training'. Booking confirmation and instructions will be sent to you prior to the event.

Course costs

The full day (9.30 – 17.00) programmes cost £50 per delegate inclusive of refreshments and course materials. Each half day (13:30 – 17.00) programme costs £30 per delegate inclusive of refreshments and course materials.

Cancellation policy

Please be aware that refunds will not be available. 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
Tel 020 7969 5500 Fax 020 7969 5566 Email events@haysmacintyre.com

If you would like to be removed from our mailing list please email us at marketing@haysmacintyre.com

The organisers

haysmacintyre chartered accountants & tax advisers

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

Our award winning charities and not for profit team is one of the largest in the UK and acts for over 600 charity and not for profit organisations. We feel the quality of our service to clients is best evidenced by the results of the annual Charity Finance Audit Survey. We are proud to rank number one for "Charity Expertise" and second for "Overall Service", and have been ranked in the top five for "Charity Expertise" for ten consecutive years.

For further information, please contact Richard Weaver, 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 more information please contact Philip Reed in the Charity and Community team on:

020 3375 7000
philip.reed@farrer.co.uk

www.farrer.co.uk

Cazenove Capital

Achieving your charity's investment objectives takes time and thought. We understand that meeting charitable objectives can be challenging. As the largest charity investment manager in the UK, we are the trusted partner of over 770 charities and are confident that we can help your charity, whatever your size, purpose and investment objectives.

For further information, please contact John Clifton on:

020 7658 3636
john.clifton@cazenovecapital.com

www.cazenovecharities.com

BOOK ONLINE NOW!

at www.haysmacintyre.com/events

Alternatively, complete the registration form below:



Title (Mr/Mrs/Ms/other)		Forename	
Surname			
Position			
Name of organisation			
Email			
Phone			
Address			
		Postcode	

Please let us know if you would like your joining instructions sent to an alternative address:

I would like to book

What every trustee should know (full day)	09:30-17:00	Tue 28/11/2017	£50.00	<input type="radio"/>
What every trustee should know (refresher)	13:30-17:00	Tue 05/12/2017	£30.00	<input type="radio"/>
Introduction to charity finance and reporting	09:30-17:00	Wed 14/02/2018	£50.00	<input type="radio"/>
Charity law update	13:30-17:00	Wed 28/02/2018	£30.00	<input type="radio"/>
What every trustee should know (full day)	09:30-17:00	Thurs 08/03/2018	£50.00	<input type="radio"/>
What every trustee should know (refresher)	13:30-17:00	Thurs 29/03/2018	£30.00	<input type="radio"/>

Data protection:

- Please tick this box if you do not wish to receive invitations to future training events
- I agree to my details being shared by all Trustee Training partners
- Please tick here to permit the name and organisation above to be added to delegate lists and to be shared with our event partners/co-speakers