
Invitation: **‘Charity Autumn Update’**

FREE seminar for our charity clients and friends

Date: Tuesday 4 October, 9.30am – 1.00pm

Location: BWMacfarlane offices, 6th Floor, Castle Chambers,
43 Castle Street, Liverpool L2 9SH

Complimentary breakfast rolls and drinks will be provided on arrival with a break for refreshments mid-morning. There will be a light buffet lunch at the end of the talks, where you are invited to stay and network.



With so much going on in the charity sector we have invited an excellent line-up of speakers to provide updates and share their expert opinions on some of the key topical issues:

Charity Law Updates



Catherine will present on a range of issues including:- Charities (Protection and Social Investment) Act 2016 – commencement regulations for provisions coming into force in 2016/2017; New Charity Commission guidance on charities & litigation/taking legal action; Fundraising Regulator and new fundraising regulations; and the new power of social investment.

Leadership and mental toughness

The most successful leaders understand the important relationship between emotional intelligence and leadership and create a workforce that is confident and enthusiastic about their work, empowered to get the job done their way, and inspired to reach personal and organisational success. But how do you develop and maintain a mental toughness to cope with all the challenges that the leadership role can bring with it, especially in the voluntary sector?



Team building and employee engagement

Following on from the above, Andy will explain how good employee engagement is vital in enabling organisations to fulfil their missions. Using his extensive experience, he will talk about how to focus on doing the simple things that really count to help understand employee motivation and in turn to make employees feel valued and inspired.

Finance matters and more

Reflecting on the latest guidance and updates from the Charity Commission, HMRC and wider sources, this talk from our own Partners Peter and Lesley will extract the pertinent points in an easy to understand and pragmatic manner. They will also focus on the latest developments in cloud accountancy software and how charities are embracing the many advantages including cost, functionality and security benefits that cloud software can bring.

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More about our expert speakers:



Catherine Rustomji, Head of Charities & Social Enterprise, DWF LLP

Catherine is an experienced charities solicitor who advises on all aspects of charity law and regulation, in particular governance, constitutional issues and advising charity trustees on their duties and responsibilities. Catherine has been advising charities, social enterprises and other not-for-profit organisations exclusively for 16 years.



Andy Whitehead, Director and Owner, AMPW LTD

AMPW was set up in 2010 by Andy who specialises in Executive Coaching, Psychometric Assessment and the development of the Leadership Mindset. Andy has over 20 years senior management and Board level experience across public, private and not-for profit organisations. His mission is "To help leaders everywhere fulfill their potential- for themselves and their organisations". Andy works with Chief Executives, Board Directors and Senior Leaders across the public, private and voluntary sectors. In addition AMPW provide distance leadership coaching, via Skype, for clients in the Middle East.



Peter Taaffe, Managing Partner / Lesley Malkin, Audit Partner, BWMacfarlane

Peter's blend of skills from his FCA & CTA qualifications and practice experience provides clients with a broad perspective on financial matters and practical advice. His focus is on improved business performance and enhanced value for clients, working with a variety of SME and charity projects. He is a member of the Committee of the Institute of Chartered Accountants in England & Wales Charities and Voluntary Sector Special Interest Group.

Lesley trained and spent nine years with PwC, qualifying with them as a Chartered Accountant. Her time there included four years as an audit and business development manager in audit and general practice, coordinating client service, before joining a 5 partner firm of accountants as an Audit Manager in 1989. She joined BWMacfarlane in 2000 and became Audit Partner in 2010. Lesley has been a director of a charity for many years, acting firstly as honorary treasurer, then as company secretary chairing committees.



Rob Hoyle, Senior Business Development Manager, QuickBooks Online

Rob works with key accounting professionals like BWMacfarlane to help develop cloud strategies for us and our clients. There is a huge amount of 'noise' around cloud software and Rob helps us to advise clients on the advantages that can be realised moving from desktop (or paper based!) solutions to the latest cloud accounting software for organisations of all sizes and complexities.

Charity executives, trustees and staff are all welcome to attend, please book with
Jessica Bennett 0151 236 1494 or email jessica.b@bwm.co.uk