



In association with:



## Invitation: 'Charity Autumn Update'

**FREE** seminar for our charity clients and friends

**Date:** Tuesday 3 October, 9.00am – 12.00pm

**Location:** BWM 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.



We have invited an excellent line-up of speakers to provide updates and share their expert opinions on some of the key topical issues:

### Agenda:



#### Introduction and financial matters update

An introduction to the overarching themes of governance and external scrutiny that link all of the talks in this seminar followed by a round-up of the latest messages and best practice guidance on finance matters from the Charity Commission, HMRC and other regulatory bodies with specific regard to the charity sector.



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#### Undertaking a Charity Governance Review

The recent Charity Governance Code overhaul provides an opportune time for charities to re-examine their governance and instil best practice. This talk will help you to understand where to begin when undertaking a review, who to involve, what it is essential not to miss out and perhaps most importantly how to keep charity governance matters relevant and helpful to the organisation going forwards too.



#### Cyber Security and General Data Protection Regulation (GDPR)

There are risks of cyber fraud today that extend way beyond the day-to-day banking and finance operations of a charity, as sensitive data can be used for everything from fundraising to strategy to service delivery. The talk will cover the latest thinking on protection from cyber crime and also provide an overview of the impact of GDPR coming into force from May 2018.



#### Social impact reporting

With external scrutiny of a charity's public benefit ever increasing, what does good social impact reporting look like today? From a funder's perspective this talk will cover how to record and report direct and indirect social impact and also the obligations of trustees if taking a loan from a social investor.

Charity executives, trustees and staff are all welcome to attend, please book with  
**Jason Murphy 0151 236 1494** or email [jason.m@bwm.co.uk](mailto:jason.m@bwm.co.uk)

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**More about our expert speakers:**



**Peter Taaffe, Managing Partner, BWM**

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 and is also a trustee at Open Awards.

**Lesley Malkin, Audit Partner, BWM**



Lesley has been a Partner at BWM since 2011, following over 10 years’ experience as an audit manager overseeing management of audit assignments for many business and charity clients. She originally trained and spent nine years with PwC, qualifying with them as a Chartered Accountant. Lesley has a wide ranging knowledge of accounts and audit matters and additionally has considerable practical knowledge from being a charity trustee for many years, including serving as a trustee during the period in which five Wirral based Citizen Advice Bureaux merged.

**Lynn Pates, Charity Consultant, Quilter Cheviot**



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Lynn has over 20 years’ experience working in Financial Services, specialising in the third sector. Most recently Lynn has worked at Asset Risk Consultants in Guernsey on the Private Client Indices Research team before becoming Director of ARC UK, initiating, developing and leading their charity services including establishing the Charity Indices and Charity Multi Asset Fund Report. She has vast experience sitting on numerous charity boards as a trustee or adviser.

**Troy Johnson, Development Director, Griffiths & Armour**



Troy regularly presents to the 3rd sector about the latest trends in risk and insurance, helping organisations review their operations and manage their exposures. He leads the business development at Griffiths & Armour alongside managing and supporting both existing and prospective clients. Troy sits on a number of committees and is currently leading a strategic global project to align business development across 110 Assurex Global Partners across the world.

**Hannah Jones, Group Head of Investments, First Ark**



Hannah leads a team of Investment Managers and Business Support Managers at First Ark Social Investment providing blended capital packages of grants and loans of between £50,000 to £150,000 for not-for-profit organisations, charities, community interest companies and other social businesses who are seeking funding to enhance their organisation’s social impact and grow their business to create sustainability. Hannah also has significant commercial experience from her time as a Relationship Manager with HSBC Commercial Banking and Barclays Business Banking.

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