

Invitation: **'Charity Spring Update'**

FREE seminar for our charity clients and friends

Date: Tuesday 24 April, 9.00am – 12.00pm

Location: Ziferblat, 4 St Pauls Square, Liverpool, L3 9SJ

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, security 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.



General Data Protection Regulation (GDPR) - a month to go!

With only one month to go from the date of this seminar to the GDPR coming into force, we have again invited Troy of Griffiths & Armour to remind us of the critical actions every organisation will need to take ahead of this deadline. By now trustees and employees should be well on their way to understanding their responsibilities under GDPR, and ensuring that updated processes and procedures are in place.



Compliant, Secure, Cost Effective - the Benefits of Cloud Computing

Building on the GDPR talk above, Cloud experts IT Answers will further explore the compliance, security and cost benefits of cloud computing. "The Cloud" is a concept that is often touted and heard more and more in terms of IT and can range from Cloud-based accountancy to Cloud-based office software. This talk will demystify the Cloud, explaining in plain terms what it means for charities and the benefits of using the Cloud to handle your traditional IT support for a more cost effective, secure and reliable infrastructure.



An informative round up of legal developments in the voluntary sector

It seems that charities are rarely out of the spotlight these days and in this pragmatic talk Partner Jenny Hampson of Knights Solicitors will cover some of the topical issues including: The Oxfam scandal - implications for the charity sector and safeguarding; The Law Commission's report - what the future might hold in terms of charity regulation and an update on other interesting legal developments and Charity Commission guidance.

Charity executives, trustees and staff are all welcome to attend. Booking is essential. Please book with:
Anna Cummings 0151 236 1494 or email anna.c@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 has been a member of the Committee of the Institute of Chartered Accountants in England & Wales Charity and Voluntary Community and is also currently 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 Citizens Advice Bureaux merged.



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.



Tommy Davies, Business Development Director, IT Answers UK Ltd

Tommy has over 20 years' experience working in the IT Sector and has been instrumental in the development of Cloud based IT products dating back 10 years. More recently Tommy has worked closely with charities of various sizes to help them transition into the Cloud for all of their IT requirements using unique and innovative products. Tommy also has significant experience in the design and development of Cloud-based software used across many business sectors and charities in particular.



Jenny Hampson, Partner, Knights Professional Services Ltd

Jenny has over 15 years' experience and can advise charities on establishing, incorporating and registering themselves, liaising with the Charity Commission, reviewing and updating governance documents, assisting with transactional and day-to-day issues, helping with disputes concerning charitable legacies and providing training for charity trustees, staff and volunteers.