



In association with:

brownejacobson



CHARITY COMMISSION  
FOR ENGLAND AND WALES



dsc  
directory of social change

## Invitation: 'Charity Autumn Update'

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

**Date:** Tuesday 2 October, 9.00am – 12.00 noon

**Location:** The Quaker Meeting House, 22 School Lane, Liverpool City Centre, L1 3BT

Complimentary breakfast pastries and drinks will be provided on arrival with talks commencing at 9.30am. There will be a break for refreshments at mid-morning too and time at the end for Q&A with our speakers.



We have invited an excellent line-up of speakers to provide updates and share their expert opinions on some of the key topical issues. There is more about our speakers on the next page.

### Agenda:



#### Introduction / overview

Peter Taaffe will provide a short introduction to the seminar and our expert speakers. He will also join the speakers for a Q&A session at the end of the morning along with BWM Audit Partner Lesley Malkin.



#### Charity Commission update

This update by the Charity Commission will include topical updates including a SORP (Statement of Recommended Practice) update, news on their recent guidance and publications, an insightful report on public trust and confidence and also a dip into some of their current regulatory concerns.

brownejacobson

#### Top tips for best Governance

Reflecting on the latest legislation affecting charities today, Catherine will share practical advice to help charities of all sizes to prioritise the key factors in ensuring good governance. The talk will also include a briefing on the new trustee disqualification and waiver provisions along with useful best practice advice for trustee appointments.



#### Charities and Revolution!

Caron will take a wide-ranging look at the charity sector today, the issues nearly all charities face (particularly those with a financial slant) and how we can successfully manage change to prepare for a better future. Caron is also Chair of the DSC (Directory of Social Change) and will be joined at the seminar by her colleagues who will have plenty of information for you to take away about the resources and help they have available for charities.



Charity executives, trustees and staff are all welcome to attend, please book with  
**Anna Cummings 0151 236 1494** or email [anna.c@bwm.co.uk](mailto:anna.c@bwm.co.uk)

## Invitation: **'Charity Autumn Update'**

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

### 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.



#### **Catherine Rustomji, Partner, Browne Jacobson**

Catherine has been advising charities, social enterprises and other not-for-profit organisations exclusively for 18 years. At Browne Jacobson Catherine specialises in charity law with particular emphasis on constitutional and governance matters, legal structures, social enterprises and duties and responsibilities of charity trustees.



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

#### **Jeff Prescott FCMA DChA, The Charity Commission**

Jeff has forty years of experience in accounting and finance. He has worked in the private, public and not-for-profit sectors, at all levels. He has worked for the Charity Commission for some ten years and has lost count of the number of charity accounts that he has looked at. He says that he has never enjoyed accounting so much! His work includes scrutinising the accounts and bank statements of charities (where the Commission has grounds for believing there is a regulatory concern), as well as proactive work and research into charity accounting related issues.



#### **Caron Bradshaw, Chief Executive, Charity Finance Group**

Caron joined CFG in 2010 from the ICAEW where she was Head of the Charity & Voluntary Community, shaping their engagement with the third sector and delivery of technical support to members of the ICAEW. Having trained as a Barrister, Caron has held responsibilities for a wide range of areas from member services to policy work. Throughout her career, Caron has taken on many Trustee and advisory roles, serving on the Board for a number of small charities from Education to Arts. Caron is currently the Chair of the Directory of Social Change. She is a member of the SORP committee and a member of the BBC Charity Appeals Advisory Panel.



Charity executives, trustees and staff are all welcome to attend, please book with  
**Anna Cummings 0151 236 1494** or email [anna.c@bwm.co.uk](mailto:anna.c@bwm.co.uk)