



In association with:



CHARITY COMMISSION
FOR ENGLAND AND WALES



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COMPANY

Invitation: 'Charity Autumn Update'

FREE seminar for our charity clients and friends

Date: Wednesday 2 October, 9.00am – 12.00pm

Location: Liverpool Quaker Meeting House, 22 School Lane, Liverpool L1 3BT

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/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.



CHARITY COMMISSION
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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 insight into current research and reports and also a dip into some of their current regulatory concerns.



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Charity mergers and partnerships

Partner Mark Forman will be talking about the increasing partnership, merger and acquisition activity we are seeing in the charity world. He will introduce us to the basic concepts, the opportunities that might present themselves, the related governance to be mindful of and of course the pitfalls to avoid.



Digital Marketing Strategies

We have asked Rosie from Kenyons to update us on the latest digital strategies that can be used to help charities engage with their audiences and maximise their impact in a cost-effective way. From her experience, she will share her top dos and don'ts, particularly in relation to the fast moving world of social media, reputation management and the power of content.

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Charity Investments

Guy will be speaking on the issues to consider when reviewing a charity's investment. With over 20 years' experience working with a broad range of UK and overseas investors Guy's main skills are in investment management, client relationship management and business development.

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

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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.

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.



Mark Forman, Partner, MSB Solicitors

Mark has 20 years legal expertise in advising businesses upon all non-contentious and contentious commercial issues and always provides practical advice. Mark and his team advise on corporate structures, investments, acquisitions and disposals; national and international commercial contracts; commercial litigation commercial, property litigation and dispute resolution; post death estate disputes; intellectual property licensing and contentious and non-contentious employment.



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Rosie Kenyon, Managing Director, Kenyons

Rosie is Managing Director of Kenyons and has worked on a wide range of client campaigns over the past 6 years. Her role involves setting the overall direction for the company as well as leading on various client campaigns and advising on digital marketing and copywriting projects.

Guy Davies, Founding Director, Yoke & Co

Guy Davies is a founding Director of Yoke & Co, a firm that specialises in charity financial governance. They help charities and trustees make more with their money. Guy is FCA authorised and a regulated independent investment advisor that provides holistic solutions to charities, trustees, individuals and their families.

