

Charities Conference 2010

- Tax Efficient Fundraising
- Making the Most of Cash and Investments
- Regulatory Review
- Auditing and Independent Examinations
- Charities and Trading
- Public Benefit Update and Feedback on Inquiries
- Charity Property – Acquisitions and Disposals



London

Bloomsbury Hotel, London
2 March 2010

The Midlands

Hilton Hotel, Castle Donington
18 March 2010

Full Day Conference £250

(including lunch) plus VAT per person

£50 for National Members 25% Discount for Local Members



Enrol online at www.mercia-group.co.uk

Charities Conference 2010

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London

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Castle Donington

Our one day charities conference has been specifically designed for partners or senior managers with responsibility for a number of charity clients. It is a specialist conference looking at a wide range of practical issues which will enable those attending to provide the best possible advice to their clients.



9.30am

Welcome and introduction by conference chairperson

9.35am

Tax Efficient Fundraising

Andrew Burgess, Mercia Group Ltd

Charities increasingly use a wide range of fundraising tools and activities – but which are the most tax efficient? This session will outline the key elements of tax effective fundraising and take a quick A to Z tour through the most common fundraising routes to determine their efficiency.

11.00am

Coffee

11.20am

Making the Most of Cash and Investments

Heather Lamont, CCLA Investment Management Ltd

- What your reserves policy needs to know about the recession
- Revisiting your risk and return priorities
- Is cash still king?

12.00noon

Regulatory Review

Phil Frost or David Gallagher, Mercia Group Ltd

An opportunity to consider current issues and relevant changes which impact on the preparation of accounts for charities. This will include going concern, related parties, groups and planned changes to the Charities SORP.

12.45pm

Lunch

1.45pm

Auditing and Independent Examinations

Phil Frost or David Gallagher, Mercia Group Ltd

A brief review of some of the current complexities surrounding audit and examination reports. Also, an early look at what clarified ISAs will mean for charity audits.

2.15pm

Charities and Trading

Abbie Rumbold or Alice Faure Walker, Bates, Wells & Braithwaite

- Does charity law allow trading?
- What about tax?
- Fee charging and public benefit – the principles
- Fee charging and public benefit – recent Charity Commission assessments

3.00pm

Tea

3.15pm

Public Benefit Update and Feedback on Inquiries

Janet Slade, Charity Commission

During this session Janet will provide an update on the Charity Commission's work and views on:

- Public benefit
- Compliance and inquiries

4.00pm

Charity Property – Acquisitions and Disposals

Ruth Williams, Charles Russell LLP

- Preliminary issues
- Acquisitions and disposals: the requirements of S26 and S27 of the Charities Act 1993
- Mortgages: the requirements of S38 and S39 of the Charities Act 1993
- Dealing with dispositions to connected persons
- Bayoumi and the Charities Act 2006

4.45pm

Close of conference

CPD Hours: 6



Mercia is recognised by the ACCA as an approved training provider. All of our courses qualify for CPD hours as required by all UK accountancy bodies.

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Speakers

Andrew Burgess MA

Andrew joined Mercia in 2003 as an experienced tax lecturer and consultant. After 14 years with the Revenue, Andrew joined Neville Russell, which became Mazars following the merger in 1998. At the time of leaving he was senior tax partner in the firm and had overall responsibility for the running of the personal tax department. His expertise lies in the areas of employment taxation, investigation work, charity tax and personal tax planning.

Alice Faure Walker BA

Alice is a consultant at Bates, Wells & Braithwaite, who she joined in 2000 to work in the charity and private client departments. Alice is a regular contributor to charity publications including being co-author of 'Charities Trading and the Law' published by Jordans.

Phil Frost BA ACA

Phil started lecturing in 1983 having qualified with Coopers & Lybrand in Sheffield. He spent many years with Financial Training - initially in Sheffield before moving to open their Leicester office and subsequently becoming the director responsible for the Midlands. Phil joined Mercia in 2001 and continues to lecture extensively on law, auditing, tax and accounts of companies and charities both to the accounting profession and to those in industry and commerce.

David Gallagher BA ACA

David is a senior audit and accounts consultant within the Mercia Team and has become one of our charity specialists. He qualified with Grant Thornton in Leicester where he had his first experience of lecturing. His role at Mercia includes lecturing, conducting file reviews, answering technical queries, responsibility for the Mercia Audit Manual and editing the charities section of the Mercia Specialist Assignments Manual.

Heather Lamont ACA

Heather Lamont has worked in voluntary sector management since qualifying as a chartered accountant in 1992. She has held senior positions as a charity finance director, chief executive, and auditor, and for five years was editor of Charity Finance magazine. Since 2005 she has focused on investment management, joining CCLA in July 2008 from the charities team at HSBC. Heather is a trustee of three different charities.

Abbie Rumbold MA

Abbie is a partner in Bates, Wells & Braithwaite, a leading law firm in the field of charities and social enterprise. Abbie is a highly regarded charity lawyer who was seconded to the DTI to work on the Community Interest Company legislation. She is chair of trustees of Missionfish and a member of the Office of the Third Sector Advisory Board. Her client work has included registering the first charity for the promotion of ethical investment.

Janet Slade

Janet is a member of the policy accountancy team at the Charity Commission, a position she has held for the last three and a half years. She is a qualified accountant and for 25 years was the senior partner at Slade and Cooper, a Manchester based practice which specialises in work with charity and other third sector clients.

Ruth Williams LLB

Ruth is a solicitor in the London office of Charles Russell. She works in their charities and not for profit sector and specialises in charity property.

Venue & Timings

London: Bloomsbury Hotel, 16-22 Great Russell Street,
London, WC1B 3NN
Tel: 0207 347 1000
2 March 2010 9.30am-4.45pm

The Midlands: The Hilton Hotel, Junction 24, M1, Derby Road,
Castle Donington, Derby DE74 2YW
Tel: 01509 674000
18 March 2010 9.30am-4.45pm

25% discount for Local Members

A 25% discount on the total price will be given to all firms who pay an annual subscription (based upon the size of their practice) to belong to a Mercia training group. This does not include firms who buy season tickets. For further information please contact Sarah Moore.

£50 for National Members

If you have recently enrolled as a National Member firm the cost of attending this conference is £50 per place.

Booking Form

I would like to book places on the Charities Conference as follows:

	No. of places in London 2 March 2010	No. of places in Castle Donington 18 March 2010
Full day conference @ £250 per person	<input type="text"/>	<input type="text"/>
A total of _____ places @ £250	£	<input type="text"/>
Less 25% discount for Local Members	£	<input type="text"/>
A total of _____ places @ £50 for National Members	£	<input type="text"/>
Sub total	£	<input type="text"/>
Plus VAT at 17.5%	£	<input type="text"/>
TOTAL	£	<input type="text"/>

Contact name

Name of firm

Address

Postcode

Telephone

Email

Please invoice my firm. I understand the usual 28 day credit terms apply

I enclose a cheque for £ _____ made payable to Mercia Group Limited

I would like to receive more information about National/Local membership

Confirmation: An email confirming your booking will be sent to our enrolment or main contact.

Joining instructions will be sent by email 10 days before the date of the event you are booked on to.

Cancellations: No refund will be made where cancellation is received less than 14 days before the date of the course. All other cancellations will be subject to a £25 administration charge. All cancellations must be in writing.



Please return to:
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For further details on this
conference please contact
Liz Coates on 0116 258 1200



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