



Charity and not-for-profit

Third sector

A fresh approach to helping you deal with the financial aspects of running your charity.

The dynamic, competitive and highly regulated environment you operate in presents a number of unique challenges. Our national charity and not-for-profit team has a genuine understanding of the sector and the relevant expertise to help you overcome its challenges and exploit the opportunities available to you.

We recognise that while your primary focus will be on those who benefit from your services, you have to manage tightly controlled finances that are then transparently reported in the public domain.

With increased competition for grant funding and charitable giving, a greater emphasis on making your accounts more accessible, and an increased burden of compliance, your charity needs to be managed better than ever.

MAXIMISING EFFICIENCY THROUGH OUR EXPERIENCE

We have decades of experience supporting clients in the charity and not-for-profit sector, and helping them deal with the various financial aspects related to the sector. Our clients include a wide range of charity and not-for-profit organisations, from local charities of varying sizes to major national organisations.

Areas of our particular expertise include advising grant making foundations, children's charities, humanitarian charities, learning providers and educational trusts, medial and health charities, academy schools, trade unions and public sector bodies.

Our considerable experience ranges from assisting with audits for grant and funding applications, advising on annual Charity Commission submissions, helping charities take advantage of the various VAT concessions available, to assisting with setting up a charity and obtaining charitable status.

PROVIDING A COMPREHENSIVE RANGE OF SERVICES

Our approach is to provide comprehensive charity audit and accounting services which help you maintain a financially sound organisation, allowing you to focus on meeting the core objectives of your charity. The range of services we provide to the sector includes:

External audit and assurance

- Audit
- Independent examinations

Tax planning & compliance

- VAT 'health check' and advice
- PAYE and NIC advice
- Corporation Tax
- Trust advice

Management Services

- Budgeting
- Cash flow projections
- Management reporting
- Internal audits
- Payroll
- Bookkeeping
- Accounts preparation



We will guide you through all relevant changes to legislation.



- Compliance with public benefit requirements
- Managing financial difficulties

Financial reporting

- Advice on governance issues
- Compliance with Charities Act and SORP

Fundraising / Trading

- Gift Aid and deeds of covenant
- Formation of limited companies for trading purposes
- Setting up branches

Other advice

- Strategic planning
- Lottery applications
- Risk assessment
- Dealing with the Charity Commission

GUIDING YOU THROUGH INDUSTRY REGULATION

We regularly provide assistance with compliance matters, including the preparation of accounts and trustees' reports that comply with the Charities Act and Charities SORP.

Our specialists have the in-depth experience and knowledge to help you deal with the evolving issues faced by your sector. We are committed to keeping you informed and ensuring that you are guided through all relevant changes to legislation and regulatory requirements.

We produce regular free newsletters and briefings on topical issues, including a Charities Update which summarises the most recent developments in your sector. Essentially, our approach is to act as a 'sounding board' and to be available to discuss emerging issues with you as they arise.

PROVIDING PROACTIVE, PARTNER-LED ADVICE

Our service philosophy comprises a highly tailored and personalised service, with a substantial level of partner involvement, and a significant emphasis on quality control. Our priority is to provide you with the necessary technical support you require to meet your financial and administrative challenges, and to offer a professional and friendly service that is driven by the needs of your charity.

THE NEXT STEP

For further information, or to arrange a meeting to discuss your specific requirements, please contact your usual UHY adviser or find your local third sector expert on our website at www.uhy-uk.com/york.

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