



- 09:15 – 09:30** **Registration**
- 09:30 – 09:35** **Welcome and seminar objectives, Sue Hutchinson**
- 09:35 – 10:35** **Financial Reporting and Charity Commission Update**

Peter Herbert, Insight Training

This session will provide an update on the Charity SORP Committee's Update Bulletin 2 and Information Sheet 2, both published in Spring 2019. We will also explore Charity Commission hot topics such as public benefit disclosures, related party transactions and reserves policies.

We will examine Charity Commission plans for increased digitisation and ask 'what makes a good trustees' report'?

- 10:35 – 11:05** **Tax Update**

Jacquie Adams, Beever and Struthers

This session will provide a tax update including the increase in small trade exemption, and Gift Aid.

We will talk a little bit about Corporate Interest Relief, loss restriction, the need to claim tax exemptions and finally about our income review to determine the correct tax treatment which can be extended to included VAT, and CIS if required.

- 11:05 – 11:20** **Break**

- 11:20 – 12:20** **Legal Duties and Responsibilities of Charity Trustees**

Catherine Rustomji, Browne Jacobson

Catherine will present a practical summary of the legal duties and responsibilities of charity trustees including examples of best practice and an explanation of the standards against which trustees are measured.

- 12:20 – 12:30** **Questions and closing remarks**

- 12:30 – 13:00** **Lunch and Networking**





Peter Herbert, FCA, Insight Training

Peter is a Director at Insight Training with core responsibility for delivering technical programmes to finance professionals and non-finance managers. He specialises in financial reporting (UK GAAP and IFRS), audit, company law and practice regulation. Peter's enthusiasm for his topic and commitment to the learning experience means his presentations are unique, relevant, fun and memorable.



Jacqui Adams, Tax Partner, Beever and Struthers

Jacqui has over 25 years' experience helping clients with a range of personal and corporate tax matters. She works closely with our Charities team, providing advice on charitable status, gift aid and tax planning issues. She is a member of The Charity Tax Group (CTG) which was set up to make representations to Government on charity taxation and is now the leading voice for the sector on this issue. In addition she is a member of Know How Non Profit, a growing community of non-profit people which share their questions and experiences whilst offering support and advice. Within the firm Jacqui is the head of our Payroll team and assists clients with workplace pensions and auto-enrolment.



Catherine Rustomji, Partner and Head of Charities and Not-for-Profit, Browne Jacobson LLP

Legal 500, 2015: 'highly professional lawyer' Catherine Rustomji has 'a wealth of knowledge and an approachable manner'.

Chambers & Partners, 2017 edition: Catherine Rustomji of Browne Jacobson LLP is held in high esteem for her advice on governance and constitutional issues as well as trustee duties. One client states: 'She is extremely knowledgeable in her field and is an excellent resource.'

Chambers & Partners, 2018 edition: Catherine Rustomji of Browne Jacobson LLP is known for her work in charity law and for advising clients on governance issues. Clients found she is 'always very competent and knowledgeable in her field,' adding that she is 'thoughtful, incisive and diplomatic.'