



Accountancy & Audit for Academy Trusts

Helping trusts strengthen financial management,
governance and long-term sustainability



Delivered by experienced specialists, tailored to your goals.

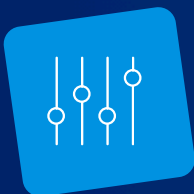


Forrester Boyd
CHARTERED ACCOUNTANTS

Supporting strong, sustainable academy trusts

Running an academy trust means balancing educational priorities with financial sustainability, strong governance and increasing demands on resources.

Our specialist education team brings financial expertise, sector knowledge and practical insights to help trustees and leadership teams strengthen financial management and make informed decisions for the future.



Financial sustainability

- ✓ Budgeting, forecasting, cash flow, reserves and scenario planning to give you greater visibility over your financial position.



Governance and assurance

- ✓ Helping trustees and leadership teams strengthen financial oversight, internal controls, risk management and internal scrutiny.





Making resources work harder

- ✓ Benchmarking, integrated curriculum and financial planning and financial insight to help you understand where resources can have the greatest impact.



Support change and growth

- ✓ Due diligence, centralisation, restructuring and financial support as your trust develops.



Compliance without the surprises

- ✓ External audit, accounts, DfE reporting, tax and regulatory requirements delivered by a team immersed in the academy sector.



Continuous Improvement not just compliance

Every academy trust is different. Our role is to understand how yours operates and provide the right expertise at the right time.

Audit and assurance

A well-managed audit should provide more than compliance. We work closely with your finance team throughout the process, communicating clearly and raising matters early.

Our support includes:

- Statutory external audit
- Internal scrutiny
- Internal controls and systems
- Regularity assurance
- Trustee and audit committee reporting

Financial management

Good decisions depend on good financial information. We help trusts strengthen their financial planning and reporting, from annual budgets through to longer-term forecasting.

Our support can include:

- Budget setting and forecasting
- Management accounts and reporting
- Cash flow and reserves
- Benchmarking and KPIs
- Integrated curriculum and financial planning
- Recovery and financial improvement planning

Specialist support

As trusts develop, new questions arise. Our wider team gives you access to expertise across tax, VAT, payroll, corporate structures and strategic financial matters when you need it.

We can also support trusts with areas including due diligence, subsidiaries, commercial activities, procurement and centralisation.

Trusted partners to over 380 schools across almost 60 trusts.

"Our role isn't simply to provide assurance over the previous year's accounts. We want to help trustees and leadership teams understand what the numbers are telling them and use that information to make stronger decisions for their trust."

Carrie Jensen, Partner and Head of Academies



Experience that goes beyond the audit

Academy trusts operate in a distinctive financial and regulatory environment. Working with schools and trusts since 2009 has given our team considerable experience of the issues that finance teams, accounting officers and trustees face.

We work with trusts of different sizes and structures, from individual academies through to established multi-academy trusts.

That breadth of experience gives us valuable perspective.

We see how different trusts approach financial management, governance and assurance and we use that experience to help our clients strengthen their own arrangements.

Connected to the issues

Shaping your sector

The education sector doesn't stand still and neither do we.

Our academy specialists are actively involved in the wider education and accountancy community, helping us keep close to developments affecting academy trusts and share experience with specialists across the profession.

Forrester Boyd is a member of UK200Group, an association of independent chartered accountancy and law firms. Our specialists contribute to its charities and education work, sharing knowledge and experience with firms supporting schools and academy trusts across the UK.

We are also involved with the DfE Auditors' Forum, giving our team valuable insight into emerging issues and developments affecting academy trusts.

What does that mean for you?

It means the advice you receive isn't based solely on what we see within your trust.

We bring together our own experience with wider sector insight, helping us identify good practice, spot emerging issues and share ideas that could benefit your organisation.



UK200Group
firms act for **12.9%**
of Academies



What our clients say...

'Friendly, super efficient and highly knowledgeable, your professionalism in the education sector is truly outstanding and your partners are a credit to Forrester Boyd. It's always easy doing business with you.'

More than an auditor

| The best adviser relationships aren't confined to the year-end.

We want our academy clients to feel able to pick up the phone throughout the year, whether you have a technical question, are considering a significant decision or simply want a second opinion.

It means that when something changes, you already have people who understand your trust, your financial position and the way you operate.

- + Trustee briefings
- + Staff training
- + Pre-audit workshops
- + Year-round access to academy specialists
- + Seminars and workshops
- + Regular technical updates

Contact us to see what we can achieve together: academies@forrester-boyd.co.uk

+ Why work with Forrester Boyd?

Several members of our team have direct experience as charity trustees and members of governing bodies. It gives us an additional appreciation of the responsibilities placed on those charged with governance and the practical realities behind the financial information we review.

What you can expect from us

People who understand academies

You'll work with an experienced team with specialist knowledge of the academy sector.

Accessible senior advisers

Our partners and senior team remain involved and available when you need them.

Clear communication

We plan ahead, keep you informed and aim to raise issues early rather than allowing surprises to emerge at the end of the process.

Constructive challenge

Good advisers shouldn't simply agree with you. We bring an independent perspective and will ask the questions that help strengthen financial management and governance.

Year-round support

Our relationship extends beyond the audit with access to our academy specialists, trustee briefings, pre-audit workshops, staff training, seminars and regular technical updates.

Let's talk about your trust

Choosing an accountant and auditor is about more than technical capability. It's about finding people you trust to understand your organisation, work well with your team and be there when you need them.

If you're reviewing your current arrangements, preparing for your next audit tender or simply want to talk through an issue affecting your trust, we'd be pleased to have a conversation.

Our Offices:

We have offices throughout Lincolnshire and Yorkshire.
To view our offices and their individual contact details
please scan the QR Code.



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Forrester Boyd is a partnership operated from offices in Grimsby, Scunthorpe, Louth, Beverley, Lincoln and Leeds.

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