

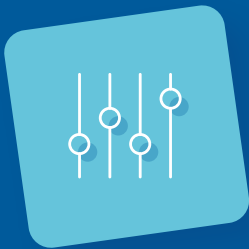
Accountancy & auditing for schools & academies

Supporting you on your
business journey



Forrester Boyd
CHARTERED ACCOUNTANTS

Supporting you with:



Internal Controls

- ✓ Processes efficiency
- ✓ Finance team procedures
- ✓ Trustee documentation & policies



Structure

- ✓ Governance
- ✓ Centralisation
- ✓ Procurement
- ✓ Integrated curriculum financial planning
- ✓ Commercial trading activities
- ✓ Subsidiaries



Monitoring

- ✓ Budget setting & reporting
- ✓ Benchmarking
- ✓ KPIs
- ✓ Management Accounts
- ✓ Internal Scrutiny



Finance

- ✓ Condition improvement fund
- ✓ Salix funding
- ✓ Investments*
- ✓ Revenue maximisation
- ✓ Recovery plans
- ✓ Due diligence



Operations

- ✓ Training
- ✓ Software
- ✓ Process updating
- ✓ Supplier contracts
- ✓ Banking
- ✓ Data security



Compliance

- ✓ End of year/In year reporting
- ✓ ESFA reporting/query management
- ✓ Related party transactions
- ✓ Internal/External audits
- ✓ VAT/PAYE/MTD/Corporation tax
- ✓ Financial handbook
- ✓ Companies House
- ✓ Gender reporting
- ✓ Pensions (EOYC)
- ✓ IR35

* Investment advice delivered by FB Wealth Management Limited, our wealth management arm.



Trusted partners to over 100 academies

Since 2009 Forrester Boyd chartered accountants have been working with schools and academies supporting them with the conversion process and the exciting opportunities this brings.

Today, we act directly for approximately 60 trusts of which there are 15 multi-academy trusts covering a broad range of schools including secondaries, primaries and special schools.

Our experience and knowledge of the education sector means that we really do understand the challenges that you face and we work with you to ensure you have the advice and support through every stage of the growth and development of your academy.

Continual learning & development:

- ✓ you do it
- ✓ students do it
- ✓ we do it

UK200
firms act for **12%**
of Academy Trusts

Our specialist academy advisers sit on the charities and education committee of UK200, a leading association of independent chartered accountants and law firms with global connections.

Collectively, UK200 support in excess of 500 independent schools and academies throughout the UK meaning that we are continually learning from each other's experiences and sharing best practice. We are also involved with the ESFA Auditors' Forum which gives us a direct voice and input into the latest information from the ESFA to ensure we can bring this expertise and knowledge back to you.

“ **Forrester Boyd provides us with an efficient, personal, service by giving sound advice. They always respond promptly to requests to meet or discuss matters on the telephone.** ”



+ Why work with Forrester Boyd?

We have a highly experienced and exceptional team who all live and breathe academies.

This is reflective in the positions that our team hold. Various members are trustees of charities and members of governing bodies which affords us a more in-depth understanding of your unique needs.

More than an auditor

We understand that our support extends way beyond just compliance, which is why we focus on providing you and your trustees with the solutions before the problems. Just some of the added value support that you can expect when working with us includes:

- + Trustee presentations
- + Staff training
- + Pre-audit workshops
- + Seminars and workshops
- + Unlimited free helpdesk
- + Newsletters

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





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Forrester Boyd Chartered Accountants is a trading style of Forrester Boyd, a partnership operated from Grimsby, Louth, Scunthorpe and Skegness.

Forrester Boyd Chartered Accountants is a trading style of Forrester Boyd Robson Limited operating from Beverley. Forrester Boyd Robson Limited is a company incorporated in England & Wales with company number 08370127 and registered office at Kingfisher Court, Plaxton Bridge Road, Woodmansey, Beverley, HU17 0RT and a wholly owned subsidiary of Forrester Boyd.

