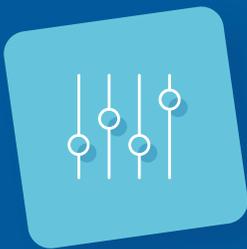


# Accountancy & auditing for schools & academies

Supporting you on your  
business journey

# 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

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



## Operations

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



## Compliance

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- ✓ End of year/In year reporting
- ✓ DfE 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 Forrester Boyd Wealth Management.



# Trusted partners to over 300 schools across 56 trusts

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.

We now act for 56 trusts and 348 schools of which there are 31 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

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

Our specialist academy advisers sit on the charities and education committee of UK200Group, a leading association of independent chartered accountants and law firms with global connections.

Collectively, UK200Group support in excess of 1,200 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 DfE Auditors' Forum which gives us a direct voice and input into the latest information from the DfE to ensure we can bring this expertise and knowledge back to you.

“**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.**”



## + 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](mailto:academies@forrester-boyd.co.uk)



Lesson for Kids  
Where does electricity come from?  
← [Solar Panel Icon] [Wind Turbine Icon]



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

Forrester Boyd is a trading name of Forrester Boyd Robson Limited. Incorporated in England & Wales with company number 08370127 and registered office at Kingfisher Court, Plaxton Bridge Road, Woodmansey, Beverley HU17 0RT

