



# Charities and not-for-profit

Supporting you so that  
you can support others



**Forrester Boyd**  
CHARTERED ACCOUNTANTS

# What you should expect from your accountant

You already know what services an accountancy firm provides so we won't tell you that. What we will tell you though is that we want you to get real value from your accountant's services.

Yes of course you can have the traditional accountancy services, but to get real value from working with us, we focus our attention on your financial strategy and objectives and what you need to help you achieve your goals.

We have experts who have worked with charities, not for profit and community interest companies for many years. Our team are ingrained in the nuances of this sector so can deliver advice and support that goes above and beyond.

- ✓ Help to evaluate the current financial performance of your charity and pin-point areas for improvement
- ✓ Support you through applications for grants and locating sources of funding to assist you
- ✓ Advice surrounding VAT and corporation tax planning in this complex sector
- ✓ Stay ahead of changing legislation in the Charities Commission
- ✓ Ensuring you are compliant with governance procedures in a timely manner
- ✓ Help to make sure your internal controls are strong to prevent fraud
- ✓ Advisory support to Trustees
- ✓ Advice in relation to trading subsidiaries and property structure to ensure maximum tax efficiency
- ✓ Pro-active and forward thinking relationship



# Charities and not-for-profit expertise

As we have already said, yes we do the accountant thing. But we also understand sectors. We have teams that focus on them. We talk your language.

It's important that we know how your charity works so we can get accustomed to it as quickly as possible. Not only is your charity unique but so is your sector and we get that.

We have invested in developing specialist teams and expertise across all of our offices located in Lincolnshire and Yorkshire. They provide a service that understands the unique challenges and technical requirements of the charity and not-for-profit sector.

“ Our adviser is always really **helpful** and able to answer our queries. Their **advice is invaluable** and it is good to know **they understand what our requirements are.** ”

# Supporting you with:



## Internal Controls

- ✓ Advice on implementation
- ✓ Finance team procedures
- ✓ Trustee documentation & policies
- ✓ Processes efficiency



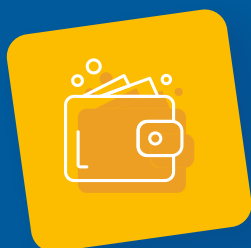
## Structure

- ✓ Governance
- ✓ Centralisation
- ✓ Procurement
- ✓ Charity registration
- ✓ Integrated curriculum financial planning
- ✓ Commercial trading activities
- ✓ Subsidiaries
- ✓ Choosing accounts software



## Monitoring

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



## Finance

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- ✓ Investments\*
- ✓ Due diligence
- ✓ Revenue maximisation
- ✓ Recovery plans



## Operations

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- ✓ Training
- ✓ Software
- ✓ Process updating
- ✓ Gift aid procedures
- ✓ Supplier contracts
- ✓ Banking
- ✓ Data security



## Compliance

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- ✓ Internal/External audits
- ✓ VAT/PAYE/MTD/Corporation tax
- ✓ IR35
- ✓ Companies House
- ✓ Gender reporting
- ✓ Grant audits

\* Investment advice delivered by FB Wealth Management Ltd, authorised and regulated by the Financial Conduct Authority.





# 6.7m

There are currently 6.7 million charity volunteers in England and Wales.<sup>1</sup>

## Are you making the most from volunteers?

As of January 2025, there were approximately 6.7 million volunteers contributing to registered charities in England and Wales.<sup>1</sup>

Research from Gov.uk reveals that individuals aged 65 to 74 exhibited the highest rates of formal volunteering at least once a month (23%), while those aged 25 to 34 had the lowest participation rate (11%).

People from higher managerial, administrative, and professional occupations showed a 21% participation rate in monthly formal volunteering, compared to 11% among those in routine and manual occupations.<sup>2</sup>

# 51%

cited work commitments as the reason for not volunteering<sup>3</sup>

## “Financial pressures and declining volunteer numbers

Charities are having to deal with increased operating costs, a trend being felt across all sectors in the UK.

This is compounded with the fact that volunteering rates are still well below pre-pandemic levels according to a recent survey.<sup>3</sup>

This is impacting small charities the hardest with four in 10 saying the number of volunteers has been insufficient to meet their main objectives.<sup>4</sup>

SOURCE OF DATA:

<sup>1</sup><https://www.policybee.co.uk/blog/uk-charity-statistics>

<sup>2</sup><https://www.gov.uk/government/statistics/community-life-survey-202324-annual-publication/community-life-survey-202324-volunteering-and-charitable-giving>

<sup>3</sup><https://www.civilsociety.co.uk/news/volunteering-rates-still-failing-to-reach-pre-pandemic-levels-government-reports.html>

<sup>4</sup><https://www.civilsociety.co.uk/news/small-charities-hit-hardest-by-volunteering-falling-to-record-low-say-researchers.html>

# Why work with Forrester Boyd?



Forrester Boyd is one of the largest independent chartered accountancy practices in Lincolnshire and Yorkshire.

As a partner led practice, we focus our attention on training and developing our staff so they can deliver their expertise, knowledge and specialist advice to you.

## A cuppa and conversation – what's not to like?

Let's talk....whatever your plans are for the future of your charity, we are happy to listen to your challenges and offer a fresh perspective and some expert advice from partners who really understand your business. Let's face it, we can all learn something from one another.

### Contact us today

for a no obligation conversation.  
What have you got to lose?

[charity@forrester-boyd.co.uk](mailto:charity@forrester-boyd.co.uk)



forrester-boyd.co.uk  
charities@forrester-boyd.co.uk

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