



CHARITIES AND NOT-FOR-PROFIT

At Thompson Jenner LLP we have a wealth of experience working alongside charities across the South West, helping them to comply with the complex and specific financial reporting required by the Charity Commission.

This can be assisting them in both their regulatory compliance, such as filing documents with the Charities Commission and Companies House where appropriate, as well as dealing with their taxation affairs with regards to HM Revenue & Customs.

In addition, we are able to offer experience in respect of assisting Trustees to increase their understanding of the charity's activities and its operating environment. Through undertaking an assessment of the influencing factors, we can assist in developing a business development strategy and then monitor actual charitable activity against the strategy in order to assist it to continue as a viable operation.

As an established professional practice of Chartered Accountants, Thompson Jenner has over 60 years' experience in advising businesses and charitable organisations to meet their legal and financial obligations. Our charities team consists of specialists drawn from across the firm ensuring that the advice and assistance given is based on the widest experience and expertise.

Our approach is always to deliver a pro-active, personal and professional service working closely with our clients in order to build lasting relationships and provide regular support throughout the year and not just on an annual basis.

Please see overleaf for more details.



This factsheet has been written for the general interest of our clients. It provides only an overview of the regulations in force at the date of publication. It is therefore essential to take advice on specific issues. No responsibility for loss occasioned by any person acting or refraining from action as a result of the material contained in this leaflet can be accepted by the firm.

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HOW WE CAN HELP

For charities and other not-for-profit clients we provide a service tailored to suit the particular needs of our clients to ensure that they meet all financial regulatory requirements. We can help with a variety of financial and accounting matters including:

- Advice on the most appropriate constitution;
- Assistance in ascertaining the reporting requirements of the entity, supporting with preparation of the accounts to ensure the requirements of the governing body are satisfied;
- Act as independent examiner for smaller charities where there is no audit requirement;
- Specialist advice on VAT, corporation tax, gift aid and other areas of specific concern to charities and the not-for-profit sector;
- Assistance with the implementation requirements of the Charities Acts and the Statement of Recommended Practice (SORP);
- Advice and recommendation for improving internal controls to further protect the assets of the entity and its trustees; and
- Procurement support and assistance in undertaking financial probity of key suppliers
- Advice on the use of trading subsidiaries and implementation of the procedures necessary to covenant any surplus profits to the main entity to gain the most tax advantageous position.

Thompson Jenner LLP has a dedicated team with the experience and specialist skills that you require to help with all your requirements. If you would like to meet to discuss the services which we are able to provide, please contact our charities partners.

We are always happy to offer a completely no cost/no obligation initial meeting.



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