

# Charity everyone counts





## Rothmans – your charity partner

Charities and not-for-profit organisations are an important part of the cultural landscape of Britain. The British public and its government have a distinguished tradition of supporting the less advantaged across a wide range of sectors – from education, health and welfare to religion, sport, arts, heritage and beyond.

But in the 21st century, competition for available funds has never been greater and with every penny hard won,

trustees of even the smallest charitable organisation need to ensure their management of funds is as efficient as possible, their risk management strategy effective, and their compliance and governance faultless.

Rothmans understands the pressures charities and their trustees face in today's environment. We work in partnership with our clients to ensure they maximise their resources.

## not just auditors

Many charities call in an accountancy firm just to undertake the annual audit and prepare their statutory accounts. But if you work with Rothmans, who understand your sector, then you get access to a wealth of experience that could save you costly accounting errors, help you maximise your funds, assist in planning your future strategy and even help train trustees.

We don't just help our clients in the good times. We are also there to give sound advice when they face obstacles and to help them make the most of unexpected opportunities as they arise.

# looking after your needs

**VAT** – we find that many charities that approach us are not paying or recovering the correct amounts. We can help with specialist VAT advice and planning, and negotiate on your behalf with HMRC, on both current and retrospective VAT issues. Our services are broad-ranging and can save our clients significant sums of money through focussed and practical advice.

**Tax planning** – our tax specialists can advise on maximising tax-efficient giving and minimising taxation requirements. We have particular expertise on matters relating to Gift Aid and handling Gift Aid donations from trading subsidiaries, as well as on how to avoid the many potential pitfalls in this area.

**Trading and group structures** – this is an important consideration for many charities as getting the right structure in place can have significant tax implications. We can advise on the best legal forms and structures for both the core charity and for its trading operations. We help our clients with issues such as the ‘de minimis’ levels for non-charitable trading, the financing of trading subsidiaries and the treatment of profits and costs across the different structures of the organisation.

**Grant applications** – we are experienced in assisting with successful grant applications for the Lottery Fund, European Regional Development Funds and other grants.

**Strategic development** – our team can advise you on a variety of options to best help you achieve your charitable aims and deliver to your beneficiaries in the long term, which may include mergers or developing new operations.

**Risk management** – we have an in-depth understanding of SORP requirements and can help you plan and implement internal controls that enable you to minimise future risks in an uncertain world. We work with charities to develop practical risk management procedures that enable staff and trustees to fulfil their roles, while understanding, managing and mitigating associated risks.

**Governance** – governance plays a significant role in the success of any charity. Our experience can help you with ‘best practice’ advice and guidance and we will assist you with complying with the regulatory requirements of the Charities Act and SORP.

**Trustee training** – we can advise and train trustees on the requirements and responsibilities of their role and governance issues relating to their organisation.

**Bookkeeping and accounting support** – we can set up and support your accounting processes, assist with financial forecasts and cashflows and give advice on managing your cost base.

**Auditing** – our team are experienced in auditing accounts for charities and not-for-profit organisations across all sectors. By developing strong relationships with our clients, we are able to focus our resources where you need them most and help ensure your systems are robust.



## working with us

Founded in 1955, Rothmans is one of the largest, independent firms of chartered accountants and business advisors in the region. We work hard to recruit and retain the best staff and continually invest in training and technology to bring you the very best service.

It is vitally important to feel confident with your accountant and advisor, so the first meeting with us is free and without obligation. We would like it to be the first meeting of many in a lasting relationship. Our fees are based on the time we spend on your affairs and we will provide you with details of our charges before taking on any assignment.

For more information about our work in the charity and not-for-profit sector, or to arrange an appointment, please visit [www.rothmansllp.com](http://www.rothmansllp.com) or call your local Rothmans office.

**Rothmans Chandlers Ford**  
T +44 (0) 23 8026 5550  
E [chandlers-ford@rothmansllp.com](mailto:chandlers-ford@rothmansllp.com)

**Rothmans Eastleigh**  
T +44 (0) 23 8061 4555  
E [eastleigh@rothmansllp.com](mailto:eastleigh@rothmansllp.com)

**Rothmans Fareham**  
T +44 (0) 1329 280221  
E [fareham@rothmansllp.com](mailto:fareham@rothmansllp.com)

**Rothmans Havant**  
T +44 (0) 23 9248 2683  
E [havant@rothmansllp.com](mailto:havant@rothmansllp.com)

**Rothmans Portsmouth North**  
T +44 (0) 23 9238 3207  
E [portsmouth-north@rothmansllp.com](mailto:portsmouth-north@rothmansllp.com)

**Rothmans Portsmouth South**  
T +44 (0) 23 9282 3777  
E [portsmouth-south@rothmansllp.com](mailto:portsmouth-south@rothmansllp.com)

**Rothmans Ringwood**  
T +44 (0) 1425 479977  
E [ringwood@rothmansllp.com](mailto:ringwood@rothmansllp.com)

**Rothmans Salisbury**  
T +44 (0) 1722 413413  
E [salisbury@rothmansllp.com](mailto:salisbury@rothmansllp.com)

**Rothmans Segensworth**  
T +44 (0) 1489 575428  
E [segensworth@rothmansllp.com](mailto:segensworth@rothmansllp.com)

**Rothmans Southampton**  
T +44 (0) 23 8021 1088  
E [southampton@rothmansllp.com](mailto:southampton@rothmansllp.com)

**Rothmans Sutton**  
T +44 (0) 20 8642 1048  
E [sutton@rothmansllp.com](mailto:sutton@rothmansllp.com)

**Rothmans Winchester**  
T +44 (0) 1962 842345  
E [winchester@rothmansllp.com](mailto:winchester@rothmansllp.com)