

# Our Service Proposal For –

## The Trustees of Local Charities and Not-for Profit organisations



**WORKING  
WITH YOU**

TO SHAPE  
YOUR FUTURE

### What makes us different?

A presentation to the Local Charities and Not-for  
Profit sector

# Traditional Values

- Whenever you seek our advice you can be sure it will always be expert, relevant and up to date and delivered with to an exceptional level of service as set out in our Client Care Code
- Very much Partner led service with qualified staff in support. All members of our team fully understand the special needs of this sector and make a point of getting to know each charity client.
- Unlimited Telephone and email Support to be there as your sounding board or for more technical advice when needed.
- Your annual audit / independent examination will be carried out in a way that dovetails in with your work practices.

# Progressive Thought

- Accept your own capability, our focus on how to add value to your finance team
- Keep you up to date with regulatory change with access to our specialists covering tax, trusts, investments, funding etc.
- Become a trusted advisor and sounding board for objective discussions on key strategic issues
- Ongoing sharing of information between our Charities specialist department and clients via Newsletters, emails and seminars.
- FB Digital, our fully supported cloud based accounting solution around Xero and Quickbooks, see [www.fb-digital.co.uk](http://www.fb-digital.co.uk)

“Forrester Boyd have been absolutely fantastic, guiding us through every step on a personal level to ensure we are doing all that we have to and with as little additional work as possible. The very much hands-on approach has been reassuring for us and meant we can keep working hard to give the children the very best.”

Head Teacher at a Primary School Hull.

Our specialist partners have a wide range of expertise between them and operate locally which enables them to regularly meet clients on site. They are:

For more info see <http://www.forrester-boyd.co.uk/specialism/charities/>



Mike Beckett  
Partner



Kevin Hopper  
Partner



Alan Nesbitt  
Partner



Neil Williams  
Partner



Carrie Jensen  
Manager

# Our Fee Quotation Summary

Once assessed your quotation would be a provided on a fixed price plus RPI for 3 years basis. The service includes:-

- 1) Annual accounts compliant with SORP's and appropriate for the charity; including a tailored, user friendly Chairman's report,
- 2) Undertaking all necessary work to allow us to supply an Audit Report with the annual accounts;
- 3) Provide pro-active advice on your systems;
- 4) Annual meeting to discuss the accounts, tax and other matters.

Please ask for a quotation for full details of what is included.

# Additional services available

- Fully compliant Payroll services, through your local Forrester Boyd office
- We can offer a cost effective, cloud based Bookkeeping service and offer a review your reporting systems, management accounts and reports.
- Assistance in creating your Investment Policy Statement, setting out the criteria that you apply to your funds along with a dynamic investment service through our own financial services business, FB Wealth Management Limited\*. [www.fbwealth.co.uk](http://www.fbwealth.co.uk)
- We are on hand to provide advice and assistance on all aspects of charity taxation including VAT and trading activities.

\*FB Wealth Management Ltd. is authorised and regulated by the Financial Conduct Authority.



# Summary of what we offer

- Very supportive and helpful staff available to help you throughout the year.
- Stress free audit process.
- Certainty of cost with many extras included.
- Experienced team locally.
- More than just auditors, able help your board in other areas too such as financial efficiency and cost reduction.
- Innovative solutions for your finance teams.
- Very highly regarded by existing clients Commitment to long term working relationships.
- Knowledge of sector with assurance of a 'safe pair of hands' in support of the trustees.

# Contact Details

For more information on any aspect of our services please contact a member of the marketing team:-

01472 350601

Email; [marketing@forrester-boyd.co.uk](mailto:marketing@forrester-boyd.co.uk)

Offices at:-

Grimsby, Louth, Scunthorpe, Skegness & Beverley



# And finally about us

Forrester Boyd is a partnership in every sense. Formed in 1935 with the merger of two North Lincolnshire partnerships, our 9 Partners and 160 employees are proud to live by the same values and high standards of service today. It's simple really. Our entire ethos is based on providing the support that clients want and need; delivered by down-to-earth people that work hard, look beyond the obvious and deliver on time and to budget.

Over the years we've expanded our range with established new services that add value to our local and national client base and mirror our culture.

In 2013, we expanded further into East Yorkshire, acquiring a well-established Beverley-based accountancy firm. Trading as a separate legal entity, Forrester Boyd Robson Ltd provides clients with the full range of accounting, tax and financial services.

Forrester Boyd is a participant of Praxity - the largest accounting alliance globally and is amongst the top 10 global Accounting Associations. [www.praxity.com](http://www.praxity.com)



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Forrester Boyd is a partnership operated from the offices listed above.



[www.forrester-boyd.co.uk](http://www.forrester-boyd.co.uk)  
[www.fb-digital.co.uk](http://www.fb-digital.co.uk)

For up to date accountancy,  
tax data and much more  
download our **FREE APP**

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