

Charitable trusts - grant making charities

Grant making trusts may be set up by individuals, during their lives or in their Wills, and may also be used as a vehicle for charitable giving by companies. A grant making charity will make distributions from its income and/or capital to a variety of charities each year, usually in response to formal grant applications.

We act for many new and established grant making charities and are able to offer practical advice and ongoing governance support. Our services for existing grant making charities or Charitable Trusts are detailed below.

Administration of Charitable Trusts – or grant making charities

The administration involved in running a grant making charity can be time consuming and it is important that proper and accurate records of meetings and decisions are kept and full accounts maintained. Our Charities team offers a full administration support service for grant making charities of all sizes.

Blake Laphorn can help you with the administration of a charity in a number of ways – these are set out below.

Start up of grant making charity

- Setting up the charity
- Registration with the Charity Commission
- Preparation of agenda of first trustees meeting
- Chairing first trustees meeting and attending further meetings as required
- Assistance with drafting investment and conflict of interest policies
- Preparation of a grant making policy and process
- Drafting a grant application form for applicants
- Arranging investment of assets

Ongoing administration

- Receiving and collating grant applications and circulating prior to trustee's meetings
- Response to questions from potential grant applicants
- Provision of an email address for receiving electronic grant applications
- Setting up a website and advertising
- Processing grant applications and payments
- Attendance at some or all trustee meetings

- Specialist charity advice as required
- Documentation to confirm change of trustees when required
- Arranging and maintaining insurance
- Preparation of minutes and legal documentation
- Liaising with investment managers
- Maintaining a bank account

Accounting and tax support

- Book keeping
- Preparation of annual accounts
- Completion and submission of charity commission annual return
- Maintaining accurate information on the Charity Commission website
- Preparing tax returns and liaising with HM Revenue and Customs
- Maintaining bank accounts and managing cash flow
- Arranging for payment of invoices
- Payment of trust expenses

Additional advice

We can advise and assist on the following matters to assist with the smooth running of the charity:

- the extent of the objects of the charity
- duties of the charity trustees
- advice on whether the proposed grants are charitable
- appropriate wording for restrictions and conditions on proposed grants
- changes to the governing documents of the charity when necessary
- buying and selling land and assets
- managing properties and agricultural land.

We can provide as much or as little support as you need, depending on the size of the charity and the experience of the trustees. We offer fixed fees for our full administration service but can also carry our work on an hourly basis.

Contact

For further information please contact Alison Talbot (01865 25421 or alison.talbot@bllaw.co.uk) or Celine Lecomte (02392 530391 or celine.lecomte@bllaw.co.uk)

This publication is not a substitute for detailed advice on specific transactions and problems and should not be taken as providing legal advice on any of the topics discussed.

Blake Laphorn uses the information it holds about you to contact you where necessary if (for instance) you have registered to attend a seminar that we are hosting or have requested information regarding the services that we provide. We will also use it to administer, support, improve and develop our business and to contact you for your views on our services, as well as to let you know about other products and services which we offer which may be of interest to you. We may send them by post, telephone or fax, email or SMS. If you would rather NOT receive further information by any particular format, or at all, or if your details need updating, please contact Kelly Benfield on 01865 253268 or by email at kelly.benfield@bllaw.co.uk. We will not disclose any of your personal identifiable information to any third parties without your express permission to do so, unless we believe that we should do so to comply with the law.