

About the contributors

BHP

Recognised nationally as a top 35 accountancy firm in the UK and a top charity audit firm, BHP is the largest independent firm of Chartered Accountants in Yorkshire and North Derbyshire. A team of 37 partners and over 300 staff serve our clients from offices in Sheffield, Cleckheaton, Leeds, York and Chesterfield.

BHP's specially trained team of 60 professionals act for more than 250 charities and not-for-profit organisations including a growing number of independent schools, companies, trusts, academies, and social enterprises, carrying out a diverse range of activities from simple smaller organisations to larger charitable groups with complex structures and funds.

In the December 2019 Charity Finance magazine annual survey of charity audit firms, which is based on feedback from our clients, we scored 97% for charity expertise and 97% for client service. This places us second in the UK for overall service.

A number of our charity team members hold the ICAEW Diploma in Charity Accounting (DChA), demonstrating BHP's high level of competence in charity accounting and financial management. Many team members are also charity trustees and school governors, meaning we have a deep understanding of the challenges that charities face.



Jane Marshall DL
Partner and Head of Charities and Not for Profit, BHP

Jane leads the specialist charity team at BHP and has been providing innovative and pragmatic advice to charity clients throughout her career which spans over 30 years.

Jane is widely recognised for her charity sector expertise and experience and acts for a wide range of charities across the sector. She is passionate about giving proactive advice to charities on issues including transparency of accounts; governance; structures, gift aid and trading and has a particular strength in being able to explain accounts to trustees in an easy to understand manner.

Jane is known for delivering excellent client care and for being a sounding board for her clients. She is experienced in delivering training to charity trustees and finance staff as well as being editor of BHP's Third Sector Update newsletter.

Jane was a member of the ICAEW Charity Committee for 10 years, holds the ICAEW's Diploma in Charity Accounting and is also a member of the Charity Finance Group. Jane is a former trustee of South Yorkshire Community Foundation, serving a 10 year period. In September 2017 Jane was appointed a Deputy Lieutenant of South Yorkshire. Jane has recently been appointed as a SORP engagement partner, an important role in terms of influencing the next charity SORP.

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Rachelle Rowbottom
Tax Partner, BHP

Rachelle joined BHP in 1998 and trained within the audit and accounts department. She qualified as a Chartered Accountant in 2003 and has experience of managing a portfolio of clients within BHP's Audit and Assurance team. Clients included owner managed businesses and a large number of charities.

Rachelle moved into the tax department in 2007 and qualified as a Chartered Tax Advisor in 2008. As a key member of the charity and not for profit team at BHP for over 20 years, Rachelle has a wide-ranging knowledge of the issues that charities face. Now an experienced Tax Director, Rachelle specifically provides advice in relation to income and corporation tax exemptions, structuring of activities to maximise tax relief and the maximisation of gift aid. Rachelle is a member of the ICAEW's Tax Faculty and also attends the Charity Tax Group's Observer Member meetings.

Lupton Fawcett

Lupton Fawcett has a long tradition of acting for independent schools particularly in Yorkshire. Our dedicated Charities and Education department draws upon the support of our specialist charity law solicitors which means that we are ideally placed to advise independent schools on governance and regulatory matters.

As a full-service law firm, we also provide our independent school clients with wider legal support, from solicitors with different specialisms in the department. This includes the type of support you would expect from a full-service law firm, such as commercial and charity property advice, commercial contracts, employment law and debt recovery; but also covers more specialist areas such as intellectual property, tax, immigration, data protection and banking, so no matter what your legal issues are, the chances are that we have a specialist solicitor to assist you.



Mark Honeywell
Partner and Head of Charities and Education, Lupton Fawcett

Mark is a specialist charities and education solicitor and as such has a wealth of experience of advising independent schools and educational foundations. Mark has advised schools from across the sector on a diverse range of issues such as incorporation, restructuring and merger, amending governing documents dealing with the Charity Commission, advising on trusts and permanent endowment, consolidating prize and bursary funds, advising on governance and trustee training.

Mark's wider education practice involves advising maintained schools and academies (with a specialism in advising religious designated schools), advising educational trusts and foundations and acting as the clerk of a Further Education College.

Mark also advises charities and not-for-profit organisations from across the sector on a broad range of issues including the establishment of new charities, incorporations, mergers, dealing with regulators and the Charity Commission, trading and the establishment of subsidiaries companies, amendments to governing documents. Mark is a member of the Charity Law Association.

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Katie Dawson
Senior Solicitor, Charities, Lupton Fawcett

Katie is a specialist Charity law solicitor who spends all of her time advising charities and not-for-profit organisations. Katie advises a number of independent schools and educational foundations specialising in incorporations and changes to legal structures, amending governing documents, advising trustees on governance issues and dealing with the Charity Commission. Katie also specialises in educational trust work particularly in dealing with educational endowment trusts.

Katie's wider charities work includes advising on charity governance, charity registrations, restructuring and mergers, dealing with the Charity Commission, complex trusts and permanent endowment issues.

Katie is a member of the Charity Law Association. She is an experienced solicitor having worked for an international law firm gaining experience in both corporate recovery law and dispute resolution specialisms as well as lecturing in law at the Open University. Katie has a particular interest in educational charities having been a school governor for 8 years.

TPT Retirement Solutions

We are one of the leading workplace pension funds in the UK. We were founded in 1946, have no shareholders and are run purely for the benefit of our members. Our Master Trust solution caters for a wide variety of customers and their scheme requirements. We currently have over 300,00 members and around 2,500 employers work with us. We manage in excess of £10 billion of assets. We provide award-winning administration, investment and legal services, with a history of providing pensions for more than 25,000 members of pension schemes employed by independent schools.

James Webster

James joined TPT in 2010 and is a Senior Manager in TPT's Employer Relationship Team. James has 20 years of industry experience and worked in an in-house pensions team and as a consultant for a global consulting firm before joining TPT. He currently has responsibility for developing relationships with key employers, managing the delivery of services to employers and supporting employers deliver key pension projects. Since 2014, James has led TPT's relationship with the 150 independent schools that participate in pension schemes provided by TPT.