

Focus on Charities, Social Enterprises and Not-For-Profits

Legal and accounting support
to help you find your way.



Here to help you to help others

Our Charity Unit is a recognised centre of excellence. Its highly experienced specialist accountants and legal advisers share your passion for effective delivery. Our clients range from major organisations with substantial assets, operating nationally and internationally, to volunteer-led local community groups.

Burton Sweet has a particularly strong and longstanding commitment to serving the charity, social enterprise and not-for-profit sectors, helping both the organisations themselves and the professional advisers who assist them.

We are proud to serve a range of clients who together represent the diversity and vibrancy of these sectors, and to support what they achieve for particular communities and wider society. Those clients include educational charities, churches and other places of worship, faith-based organisations, professional institutions, sports and social clubs, village halls and community centres.

Accounting, Audit, Independent Examination and Related Services

As well as preparing accounts that meet required reporting standards and carrying out audits and independent examinations, our specially trained accountants ensure that trustees are kept up to date about the financial and administrative benefits that their legal entity is entitled to.

Whether a major organisation with substantial assets or a small volunteer-managed community group, our team makes sure you are equipped with the knowledge and confidence you need to face both challenges and opportunities.

Legal Advice and Support

Charities and voluntary organisations are subject to considerable regulation and particular legislation. We help you deal with the many opportunities and challenges those present, including the important and sometimes difficult practical issues, the public accountability and regulatory scrutiny dimensions.

We guide you through the ever-changing requirements of charity and company law, so you can focus on delivering real benefits to those you exist to serve.

Specialist Support

Our experts are on hand to advise on all financial and legal issues:

Accounting, Audit, Independent Examination and Related Services

- Accountancy services
- Audit service
- Independent examination
- Financial and strategic planning
- Information technology
- Outsourcing of finance department
- Tax and VAT assistance

Legal Advice and Support

- Charity law and regulation
- Governance and membership issues
- Constitutions healthchecks and changes
- Public benefit reviews
- Establishing new organisations and registering new charities
- Conversions to alternative legal forms
- Community amateur sports clubs
- Community interest companies
- Advice on fundraising and trading
- Trading subsidiaries
- Trustee training and board development and assessment



There is more common sense in this conversation than I've heard all year.

Case Study A Better Positioned Charity



Social Inclusion and Equal Access

A Scottish charity working for social inclusion for people with disabilities.

The Challenge

SDEF recognised the need for change when it was appointed as the umbrella body in Scotland for Access Panels and it was around this time that our legal expert, Cecile Gillard, was in touch with the SDEF team for the first time. Following the appointment the charity was receiving major funding from the Scottish Executive and becoming a leading authority for promoting access for people with disabilities to the built and natural environments.

The charity is a user-led membership body representing a wide range of unincorporated bodies in Scotland. As it grew and developed, the need for change became apparent. Practical legal advice and assistance were recognised as being fundamental to the charity's evolution, not just initially but on an ongoing basis.

The Solution

The charity chose Burton Sweet because the breadth of our legal knowledge and skills, as well as financial acumen, perfectly fitted their needs.

To be effective in meeting the new challenge it faced, a more appropriate legal structure was needed, plus an updated governance structure and a modernised constitution.

Great Results

SDEF was greatly assisted by Cecile in developing a good governance structure and appropriate constitution. Alongside the right legal structure, these factors facilitate its vital work in influencing policy and enhancing social inclusion of those with disabilities in Scotland.

Cecile continues to support the charity in adhering to correct legal procedures and meeting the requirements of the charity and company regulators.

We continue to guide the charity's board and staff, advising on and assisting with governance and constitutional matters as well as providing other professional legal support when needed.



Your contribution is invaluable. We particularly appreciate your attentiveness and your mastery of charity law.
Wyn Merrells, SDEF

Expert Advisers and Support



Ed Marsh

Title Partner – Charity Services
Contact 0117 914 2057
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Skills Charity Accounting and reporting,
trustee training and advice
Business Types Not-for-profit organisations
Specialisms Charity and not-for-profit

Ed Marsh heads up the Charities team and is a chartered accountant with extensive and varied audit experience. Having been awarded the respected ICAEW diploma in charity accounting, he advises on all aspects of compliance and regulation of the voluntary sector and has a large and varied portfolio of clients.

Ed is part of the senior leadership team and head of finance for a large group of churches and acts as a trustee for three local charities. A regular speaker at charity training events, Ed's particular expertise is in advising faith-based charities.



Cecile Gillard

Title Legal Manager, Charity and
Voluntary Sector Unit
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Skills Charity and company law advice;
constitutions and governance; trustee
and board training
Business Types Charities and not-for-profit
organisations
Specialisms Charity, social enterprise
and not-for-profit

Cecile Gillard is a legal professional and specialist in charity and company law. She has particular expertise in relation to the Charities and Companies Acts 2006 and the Charities and Trustee Investment (Scotland) Act 2005; the practical implications of the legal and regulatory regimes for charities in England and Wales and in Scotland; the governance of charities and not-for-profit entities and constitutional issues relevant to them. Cecile is a voluntary Secretary and Trustee for some West Country-based charities.

A regular speaker at events, including Charity Secretarial Administration and Company Administration Seminars, she is author of 'Charities and Not-for-Profits', co-author of 'Company Secretarial Precedents', a general editor of the 'Charities Administration Service' and regular contributor to charity and voluntary sector publications.

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